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MARKET ANALYSIS KOUCHIBOUGUAC NATIONAL PARK
EXECUTIVE SUMMARY

PREPARED FOR

THE CANADIAN PARKS SERVICE
ATLANTIC REGIONAL OFFICE
SOCIO-ECONOMIC SECTION

ZINS BEAUCHESNE AND ASSOCIATES

990, DE BOURGOGNE
SUITE 101
STE-FOY, QUEBEC
G1W 2L5
(418) 657-2200

2005, PEEL
SUITE 1100
MONTREAL
H3A 3B8
(514) 843-8825

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MARKET ANALYSIS
KOUCHIBOUGUAC NATIONAL PARK
EXECUTIVE SUMMARY

1.0 INTRODUCTION

Kouchibouguac National Park (KNP) is located in South Eastern New Brunswick and is a natural attraction in Atlantic Canada. The park main attractions are: the beach, outdoor recreation, nature interpretation and programs, camping and winter cross-country skiing.

1.1 STUDY PURPOSE

The purpose of this study was to segment, profile and analyze four market areas:

a) Area I - Current Park visitors
b) Area II - Highway 11 Tourists and Excursionists
c) Area III - New Brunswick Non Resident Tourists and Excursionists
d) Area IV - New Brunswick resident Tourists and Excursionists

An additional objective was to determine the characteristics, needs and expectations of all market segments included in the above market areas and to recommend how the Parks Service can better serve Kouchibouguac's current and potential visitors.

1.2 STRUCTURE OF THE REPORT

The report is structured in two parts. The first part (A) is the segmentation and profiling of Kouchibouguac four market areas. The second part (B) is based upon the results of part A and presents an analysis of the park offer in relation to market potentials and targets priorities. Specific marketing strategies are finally recommended for each target market in order to increase public awareness, appreciation and market capture of KNP and to better respond to current and potential park visitors needs and expectations.

1.3 STUDY METHODS

The research methods used were univariate, bivariate and multivariate statistical analyses of summer survey data completed during 1988 and winter survey data collected during 1986. Correspondence analysis was used as a multivariate technique to present graphical displays of contingency tables. Analyses of the resulting mappings allowed us to identify the market underlying structures (*a posteriori* segmentation) in terms of similarities in needs and expectations of current park visitors.

Analysis of potential visitors was based upon secondary data such as the New Brunswick Exit Survey of 1983, the Financial Post Survey of Markets 1986, Touriscope 1986, Domestic Travel Longwoods Research Group Inc. 1986 and Statistics Canada International Travel.

Strategic recommendations were based upon assessment of potential markets, current capture (or market penetration) and possible capture as defined in marketing principles and according to the theory of the diffusion of innovation.

1.4 MARKET SEGMENTATION

For the purpose of this study, market segmentation profiles were mainly based upon the geographic origin and visit purpose of summer parties. Winter visitors were analysed according to geographical origin. More detailed segmentation bases of current markets were also taken into account and presented graphically.

2.0 KOUCHIBOUGUAC NATIONAL PARK CURRENT MARKET

Kouchibouguac National Park has been visited by more than 120,000 visitors from January to December 1988. The summer season accounts for 64%, the winter season, 13% and the shoulder seasons 23%.

2.1 THE SUMMER MARKET

According to the summer survey of 1988, Kent County is the most important source of visitor parties (26.6%) followed by Other New Brunswick Counties, Quebec, Westmorland County, Ontario, U.S.A. and other countries, Atlantic except New Brunswick, Northumberland County and Other Canada.

The general park customer profile indicates that 45.5% of parties are English speaking and that the main reasons for visit (in decreasing order) are: the beach, camping and sightseeing. The percentage of first visit is 39.5% and 46.3% of the visitor parties are aware of KNP conservation mandate. The main interpretation programs participated in (in decreasing order) are: the Visitor Reception Center (VCR), Boardwalk exhibits and VCR exhibits. The dominant party composition (in decreasing order) are: family with children and couple. The average party size is 3 persons and the main sources of trip information (in decreasing order) are: Friends and/or relatives, tourist bureau, and tourist guide.

The analysis of summer parties by origin has been examined on an a posteriori basis using the mapping approach. The interpretation of mappings indicates a global summer market structure of two segments with the following distinctive characteristics:

Segment 1: Parties from Kent, Northumberland and Other New Brunswick (51.8%).

- Prefer fun, personal well being and more sportive activities.
- Prefer family programs.
- Tend to be group of friends or families with children.

Segment 2: Parties from Quebec, Ontario, U.S.A., Westmorland [*], and Atlantic (except New Brunswick) (48.2%).

- Prefer nature, scenic and less sportive activities.
- Prefer educational programs.
- Tend to be more in couples without children.

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[*] Westmorland is not always clearly associated with the second segment especially as regards summer programs.

2.2 THE WINTER MARKET

According to the winter survey of 1986, the centre of Kent County is the most important source of visitors followed by visitors coming from 10 to 25 kilometers, those coming from more than 25 kilometers, from Westmorland and from Other New Brunswick. Forty four percent (44 %) of the day-time skiers are coming 1 to 5 times per month. Twenty seven percent (27 %) of day-time skiers are spending one to one and a half hour in the park. Seventy seven percent (77 %) of the visitors are coming for cross-country skiing. Weekend visitors account for 62% of the total. The dominant party composition (in decreasing order) is: alone, couple and group of friends.

The analysis of winter parties by origin has been examined on an a posteriori basis using the mapping approach. The examination of the mappings indicates a global winter market structure of three segments with the following distinctive characteristics.

Segment 1: Parties from Centre Kent (44%)

. Prefer weekdays visit of 1h30 at most.
. Prefer sightseeing and are skiing more than 5 times/month.
. Plan to come 20 times or more.
. Tend to be alone without children under 12.

Segment 2: Parties from middle Kent and Other Kent (34.9%)

. Prefer weekend visit of 1h30 to 3h.
. Use the waxing Chalet
. Plan to come less frequently than segment 1.
. Tend to be couples or friends.

Segment 3: Parties from Westmorland and Other New Brunwick (20%).

- Are less frequent cross-country skiers.
- Spend more than 3h in the park.
- Tend to use the restaurant (Westmorland) or bring lunch (other N.B.).
- Use the Reception Centre.
- Plan to come less frequently than segment 2.
- Tend to be family with children or groups.

2.3 THE ECONOMIC IMPACT

The economic impact of summer parties coming from outside Kent County is also examined. Results from the summer survey of 1988 indicated that the mean length of trip in New Brunswick was 5 days and that the mean time spent in Kent County was 3.48 days. The mean total expenditures per party for the stay in Kent County was $146.00. The economic contribution is provided by party origin in terms of number of parties, time and dollars spent in Kent County. Hence, the relative contribution of parties from different origins can be examined in relation to number of parties, time and dollars spent in Kent County.

3.0 ANALYSIS OF THE PARK OFFER

Global objectives and orientations of Natural Parks are interrelated with the use of natural resources, public activity and local integration of Kouchibouguac National Park (KNP). The specific offer of KNP is structured around the following elements:

- a natural seashore experience that can be visited through a network of trails;

- a beach in a natural setting;

- a recreational park with a variety of outdoors activities;

- a campground by the sea;

- a winter park for cross-country skiing.

4.0 MARKET POTENTIALS, TARGETS AND PRIORITIES

4.1 CURRENT MARKETS

First, current markets structure is reviewed in terms of percent of French speaking and repeat visit by origin. French speaking is above 50 % for parties from Kent County, Quebec and Westmorland County. Repeat visit is above 50 % for parties from Kent County, other New Brunswick, Westmorland and Northumberland Counties. Current markets are also examined for dominant and distinctive activities. As indicated in part A of the report a global structure of two segments is revealed by multivariate analysis. This structure is related to the distinctive activities participated in by summer parties. The first segment prefers more sportive activities related to fun and personal well being and is composed of parties from the local regional or provincial areas. The second segment prefers less sportive activities more related to nature and education programs and is composed of parties coming from outside New Brunswick.

4.2 POTENTIAL MARKETS

Potential markets are then reviewed and measured under the assumption of the absence of competition and of a sufficient marketing effort. The local market of Kent County and Northumberland is estimated at 86,700 person-trips, route 11 (market area II) accounts for 110,010 potential person-trips, visitors from outside New Brunswick (market area III) amount to a global potential of 770,451 person-trips per year and New Brunswick residents (market area IV) accounts for 1,687,000 person-trips per year. The total potential market (excluding route 11 which is a part of market areas III and IV) is then estimated at 2,544,151 person-trips per year, if an optimal marketing effort is made.

Specific profiles of each potential market are then presented in terms of origin, trip motivations, activities and camping as accommodation. Seasonal profiles for each quarter are also indicated for each potential markets. The following potential market profiles are available:

- Profile of Kent and Northumberland Counties;
- Profile of New Brunswick non-resident tourists and excursionists (market area III);
  - Quebec tourists travelling outside Quebec;
  - Ontario tourists travelling outside Ontario;
  - American tourists travelling in Canada;
  - Atlantic tourists (other than New Brunswick) travelling in Canada.
- Profile of New Brunswick residents travelling within New Brunswick (market area IV).

4.3 CAPTURE OF POTENTIAL MARKETS

Potential market capture is defined as the current level of visit divided by potential of specific New Brunswick visitors. The current capture is estimated at 5.1 % for all markets. As regards the local market, current capture is at 44.8 %, for market area III (outside New Brunswick) it is 4.3 % and for market area IV it is 1.7 %.

4.4 TARGET MARKET PRIORITIES

Each specific target markets within market areas II, III and IV are examined in relation to seven main objectives of KNP. Priorities are also established for each of the four seasons.

5.0 MARKETING STRATEGY AND PLANNING

In relation to priorities, estimations of targetable penetration rates are established in relation to specific marketing programs. The following level of yearly person-trips in four years from now are proposed as attainable objectives:

- Local market	45 466 person-trips
- Highway 11	8 251 person-trips
- New Brunswick residents	126 525 person-trips
- Market outside New Brunswick	
. Quebec	17 900 person-trips
. Ontario	2 975 person-trips
. USA	3 339 person-trips
. Atlantic (other than N.B.)	33 000 person-trips

A master marketing strategy is proposed with the priority emphasis on local markets to increase the awareness of the mission and mandate of KNP. Regional markets are given priority for off seasons periods. Following, in decreasing order of priority are: Route 11, New Brunswick residents, Quebec, Atlantic, Ontario and USA.

KNP central positionning should be structured around a national park on a seashore, with a secondary positionning including the natural beach, playground and campground.

Detailed suggestions are also included as regards each elements of the appropriate marketing mix for KNP. Recommendations are proposed in terms of the product offering, access to the park, pricing strategy, visibility, promotion and various communication activities.

6.0 TARGET MARKETS APPROACHES AND MARKETING MIXES

Specific marketing approaches supported by a specific marketing mix are indicated for each target market. Tables are developed to present the origin, the motivations, the level, the objectives and the justification of the priority for each market. Then action programs are detailed for each market in terms of product, pricing, access, communication and promotion.

The park offer is presented in detail in appendix I and suggestions to improve market analysis and management strategy recommendations are included in appendix II.

Zins Beauchesne et Associés

Analyse et Planification Marketing

ANALYSE DE MARCHE
DU PARC NATIONAL
KOUCHIBOUGUAC

RESUME MANAGERIAL

MARKET ANALYSIS KOUCHIBOUGUAC NATIONAL PARK
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ANALYSE DE MARCHE DU
PARC NATIONAL KOUCHIBOUGUAC
RESUME MANAGERIAL

1.0 INTRODUCTION

Le parc national Kouchibouguac est situé dans le sud est du Nouveau-Brunswick et il présente un lieu d'attrait naturel dans les provinces de l'Atlantique au Canada. Les principales caractéristiques attrayantes du parc sont: la plage, les activités de plein air, les programmes d'interprétation de la nature, le camping et le ski de fond l'hiver.

1.1 BUT DE L'ANALYSE

Le but de cette étude était de segmenter, de dresser le profil et d'analyser les quatre marchés du parc suivants:

a) Marché I -	Les visiteurs actuels du parc
b) Marché II -	Les touristes et les excursionnistes de la route 11
c) Marché III -	Les touristes et les excursionnistes non résidents au Nouveau Brunswick
d) Marché IV -	Les touristes et les excursionnistes résidents du Nouveau Brunswick

Plus spécifiquement, l'objectif était de déterminer les caractéristiques, les besoins et les attentes de tous les segments de marché ci-dessus et de recommander au Service des parcs une façon de mieux servir les visiteurs actuels et potentiels de Kouchibouguac.

1.2 PRESENTATION DU RAPPORT

Le rapport se présente en deux parties. La première partie (A) comporte la segmentation et le profil de chacun des quatre marchés de Kouchibouguac. La seconde partie (B) découle des résultats obtenus à la partie A et présente l'analyse de l'offre du parc en relation avec les marchés potentiels et les cibles prioritaires. Des stratégies spécifiques de marketing sont finalement recommandées pour chaque marché cible en vue d'augmenter la notoriété publique du parc, son appréciation, sa part de marché ainsi que pour mieux répondre aux besoins et aux attentes des visiteurs potentiels du parc.

1.3 METHODES DE RECHERCHE

Les méthodes de recherche utilisées ont comporté des analyses statistiques univariées, bivariées et multivariées sur les données d'enquêtes réalisées au cours de l'été 1988 et de l'hiver 1986. L'analyse factorielle des correspondances a été utilisée en tant qu'analyse multivariée pour réaliser la représentation graphique de tableaux de fréquences à double entrées. L'analyse des cartes de perception qui en résulte permet d'identifier les structure de marché sous-jacentes (par une segmentation a posteriori) en relation avec les similitudes de besoins et d'attentes des différents visiteurs actuels du parc.

L'analyse des visiteurs potentiels s'est faite en utilisant les données secondaires de l'enquête de 1983 sur les automobilistes ayant quitté le Nouveau-Brunswick, les données de 1986 du Financial Post Survey of Markets, le Touriscope 1986, le rapport de 1986 du groupe de recherche Longwoods sur les voyages domestiques et les données sur les voyages internationaux de Statistique Canada.

Les recommandations stratégiques furent fondées sur l'évaluation des marchés potentiels, de la part de marché actuelle (ou de la pénétration de marché) et de la part de marché possible conformément aux définitions énoncées dans les principes de marketing et en relation avec la théorie de la diffusion de l'innovation.

1.4 SEGMENTATION DU MARCHE

Pour les fins de cette étude, les profils de segments de marché sont fondés principalement sur l'origine géographique et sur le but de la visite en ce qui concerne les groupes-visiteurs de la saison d'été. Les visiteurs de la saison d'hiver furent analysés en fonction de l'origine géographique. Des bases de segmentation plus détaillées furent également considérées et présentées graphiquement.

2.0 LE MARCHE ACTUEL DU PARC NATIONAL KOUCHIBOUGUAC

Le parc national Kouchibouguac a reçu la visite de plus de 120 000 visiteurs de janvier à décembre 1988. La saison d'été représente 64 %, la saison d'hiver 13 % et les saisons intermédiaires 23 %.

2.1 LE MARCHE D'ETE

D'après l'enquête de l'été 1988 le comté de Kent est la source la plus importante de groupes-visiteurs (26,6 %) suivie par les autres comtés du Nouveau-Brunswick, le Québec, le comté de Westmorland, l'Ontario, les U.S.A. et autres pays, la région Atlantique à l'exception du Nouveau-Brunswick, le comté de Northumberland et les autres régions du Canada.

En général le profil du client du parc indique que 45,5 % des groupes-visiteurs parlent l'anglais et que les principales raisons de la visite sont (en ordre décroissant): la plage, le camping et le tourisme. Le pourcentage de ceux qui viennent pour la première fois est de 39,5 % et 46,3 % des groupes-visiteurs sont au courant du mandat de conservation du parc. Les principaux programmes d'interprétation auxquels les groupes-visiteurs ont participé sont (en ordre décroissant): Le Centre d'Information aux Visiteurs (CIV), les panneaux sur la passerelle de la plage et l'exposition au CIV. Les compositions dominantes du groupe-visiteur (en ordre décroissant) sont: En famille avec des enfants et en couple. La taille moyenne des groupes est de 3 personnes et les principales sources d'information pour le voyage (en ordre décroissant) sont: Les amis et/ou la parenté, un bureau de tourisme et un guide touristique.

L'analyse des groupes-visiteurs de l'été en fonction de l'origine a fait l'objet d'un examen sur une base a posteriori à partir des cartes de perception. L'interprétation des cartes de perception indique que le marché de l'été se structure en deux segments de marché qui présentent les caractéristiques distinctives suivantes:

Segment 1: Groupes-visiteurs du Kent, Northumberland et autres régions du Nouveau-Brunswick (51,8 %).

. Préfèrent l'amusement, le bien-être personnel et les activités plus sportives.
. Préfèrent les programmes familiaux.
. Tendent à être en groupes d'amis ou en famille avec des enfants.

Segment 2: Groupes-visiteurs du Québec, Ontario, U.S.A., Westmorland*, et de l'Atlantique (à l'exception du Nouveau-Brunswick) (48,2 %).

. Préfèrent la nature, les activités d'observation et moins sportives.
. Préfèrent les programmes éducatifs.
. Tendent à être plus en couples sans enfant.

2.2 LE MARCHE D'HIVER

D'après l'enquête de l'hiver 1986, le centre du comté de Kent est la source la plus importante de visiteurs suivie par les visiteurs qui viennent de 10 à 25 kilomètres, ceux qui viennent de plus de 25 kilomètres, du comté de Westmorland et d'ailleurs au Nouveau-Brunswick. Quarante-quatre pourcent (44 %) des skieurs de jour viennent de 1 à 5 fois par mois. Vingt-sept pourcent (27 %) des skieurs de jour passent de une à une heure et demi dans le parc. Soixante-dix-sept (77 %) des visiteurs viennent pour faire du ski de fond. Les visiteurs du week-end représentent 62 % du total. La composition dominante des groupes (en ordre décroissant) est: Seul, en couple et en groupe d'amis.

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* Le comté de Westmorland n'est pas toujours clairement associé au second segment, en particulier en ce qui concerne les programmes d'été.

L'analyse des groupes-visiteurs de l'hiver en fonction de l'origine a fait l'objet d'un examen sur une base a posteriori à partir des cartes de perception. L'interprétation des cartes de perception indique que le marché de l'hiver se structure en trois segments de marché qui présentent les caractéristiques distinctives suivantes:

Segment 1: Groupes-visiteurs du centre du comté de Kent (44 %)

- . Préfèrent les visites en semaine de 1h30 au plus.
- . Préfèrent le tourisme et skient plus de 5 fois par mois.
- . Prévoient de venir 20 fois ou plus.
- . Tendent à être seuls sans enfant de moins de 12 ans.

Segment 2: Groupes-visiteurs du milieu du comté de Kent et du reste du comté de Kent (34,9 %)

- . Préfèrent les visites de week-end de 1h30 à 3h.
- . Utilisent le chalet de fartage.
- . Prévoient de venir moins fréquemment que le segment 1.
- . Tendent à être des couples ou des amis.

Segment 3: Groupes-visiteurs du comté de Westmorland et du reste du Nouveau-Brunswick (20 %)

- . Sont des skieurs de fond moins fréquent.
- . Passent plus de 3h dans le parc.

- Tendent à utiliser le restaurant (Westmorland) ou à apporter leur collation (reste du Nouveau-Brunswick).
- Utilisent le Centre d'Information.
- Prévoient de venir moins fréquemment que le segment 2.
- Tendent à être des familles avec des enfants ou des groupes.

2.3 L'IMPACT ECONOMIQUE

L'impact économique des groupes-visiteurs en provenance de l'extérieur du comté de Kent a aussi été analysé. Les résultats de l'enquête d'été de 1988 indiquèrent que la longueur moyenne d'un voyage au Nouveau-Brunswick était de 5 jours et que la durée moyenne du séjour dans le comté de Kent était de 3,48 jours. Les dépenses totales moyennes par groupe pendant le séjour dans le comté de Kent étaient de 146,00 dollars. La contribution économique, en fonction de l'origine des groupes, est analysée en relation avec le nombre de groupes, le temps passé et les dollars dépensés dans le comté de Kent. Ainsi, il est possible d'évaluer la contribution relative des groupes-visiteurs de différentes origines en relation avec le nombre de groupes le temps passé et les dollars dépensés dans le comté de Kent.

3.0 ANALYSE DE L'OFFRE DU PARC

Les objectifs globaux et les orientations des parcs nationaux sont interreliés à l'utilisation des ressources naturelles, à la présence du public ainsi qu'à l'intégration locale du parc national Kouchibouguac (PNK). L'offre spécifique de PNK comprend les éléments suivants:

- l'expérience d'une côte maritime naturelle dont on peut faire la visite par l'intermédiaire d'un réseau de sentiers;
- une plage dans un environnement naturel;
- un parc récréatif avec une variété d'activités de plein air;
- un camping près de la mer;
- un parc d'hiver pour le ski de fond.

4.0 MARCHES POTENTIELS, CIBLES ET PRIORITES

4.1 MARCHES ACTUELS

Les marchés actuels sont d'abord passés en revue en fonction du pourcentage de francophone et de la répétition de la visite. Les groupes-visiteurs, dont la langue est le français pour plus de

50 %, sont originaires du comté de Kent, du Québec et du comté de Westmorland. La répétition de la visite dépasse le 50 % pour les groupes du comté de Kent, le reste du Nouveau-Brunswick, les comtés de Westmorland et de Northumberland. Comme l'indique la partie A du rapport, l'analyse multivariée permet de découvrir une structure de marché en deux segments. Cette structure est reliée aux activités distinctives auquelles participent les groupes-visiteurs de l'été. Le premier segment préfère les activités plus sportives reliées à l'amusement et au bien-être personnel et il se compose de groupes d'origine locale, régionale ou provinciale. Le second segment préfère les activités moins sportives plus reliées à la nature et aux programmes d'éducation et il se compose de groupes en provenance de l'extérieur du Nouveau-Brunswick.

4.2 MARCHES POTENTIELS

Les marchés potentiels sont ensuite présentés et mesurés dans l'hypothèse d'une absence de concurrence et d'un effort de marketing suffisant. Le marché local du comté de Kent et de Northumberland est estimé à 86 700 voyages-personnes, la route 11 (marché II) représente 110 010 voyages-personnes potentiels, les visiteurs en provenance de l'extérieur du Nouveau-Brunswick (marché III) représentent un potentiel global de 770 451 voyages-personnes par année et les résidents du Nouveau-Brunswick (marché IV) représentent 1 687 000 voyages-personnes potentiels par année. Le marché potentiel total (en excluant la route 11 qui fait partie des marchés III et IV) est alors estimé à 2 544 151 personnes voyages par année si un effort optimal de marketing est consenti.

Les profils spécifiques de chaque marché potentiel sont ensuite présentés en fonction de l'origine, des motivations du voyage, des activités et du camping comme choix d'hébergement. Les profils saisonniers pour chaque trimestre sont aussi indiqués pour chaque marché potentiel. Les profils pour les marchés potentiels suivants sont disponibles:

- Le profil pour les comtés de Kent et de Northumberland;
- Le profil pour les touristes et les excursionnistes non résidents du Nouveau-Brunswick (marché III);
  - . Touristes du Québec voyageant en dehors du Québec;
  - . Touristes de l'Ontario voyageant au Canada;
  - . Touristes américains voyageant au Canada;
  - . Touristes de l'Atlantique (autre que le Nouveau-Brunswick) voyageant au Canada.
- Le profil des résidents du Nouveau-Brunswick voyageant à l'intérieur du Nouveau-Brunswick (marché IV).

4.3 PART ACTUELLE DES MARCHES POTENTIELS

La part actuelle de marché est définie comme le niveau actuel de visites divisé par le potentiel des visiteurs au Nouveau-Brunswick. La part de marché actuelle est estimée à 5,1 % pour l'ensemble de tous les marchés. En ce qui concerne le marché local, la part de marché actuelle est de 44,8 % pour le marché III (non-résidents du Nouveau-Brunswick) elle est de 4,3 % et pour le marché IV elle est de 1,7 %.

4.4 MARCHES CIBLES PRIORITAIRES

Chaque marché cible spécifique est examiné à l'intérieur des marchés I, III et IV en relation avec les sept principaux objectifs du PNK. Des priorités sont aussi proposées pour chacune des quatre saisons.

5.0 STRATEGIE MARKETING ET PLANIFICATION

En relation avec les priorités, des objectifs de taux de pénétration sont indiqués en relation avec des programmes marketing spécifiques. Les niveaux annuels suivants de voyages-personnes sont proposés comme objectifs réalisables dans quatre ans à partir d'aujourd'hui.

- Marché local	45 466	voyages-personnes
- Route 11	8 251	voyages-personnes
- Résidents du Nouveau-Brunswick	126 525	voyages-personnes
- Non-résidents du Nouveau-Brunswick		
. Québec	17 900	voyages-personnes
. Ontario	2 975	voyages-personnes
. U.S.A.	3 339	voyages-personnes
. Atlantique (autre que N.B.)	33 000	voyages-personnes

Une stratégie marketing maîtresse est proposée dont la priorité met l'accent sur les marchés locaux en vue d'accroître la connaissance de la mission et du mandant du PNK. Les marchés régionaux reçoivent la priorité pour les saisons intermédiaires.

En ordre décroissant de priorité on trouve les marchés suivants: la route 11, les résidents du Nouveau-Brunswick, le Québec, l'Atlantique, l'Ontario et les U.S.A.

Le positionnement central du PNK doit être structuré en relation avec le thème d'un parc national sur une côte maritime, le positionnement secondaire doit comporter la plage naturelle, l'activité récréative et le camping.

Des suggestions détaillées sont aussi ajoutées en ce qui concerne chacun des éléments du mix marketing approprié pour le PNK. Les recommandations sont exprimées en termes de l'offre de produit, de l'accès au parc, de la stratégie de prix, de la visibilité, de la promotion et des diverses activités de communication.

6.0 LES MARCHES CIBLES ET LES MIX MARKETING APPROPRIES

Les programmes spécifiques de marketing exprimés en termes de mix marketing détaillés sont proposés pour chaque marché cible. Pour chaque marché cible, des tableaux sont présentés à l'intérieur desquels sont indiqués l'origine des visiteurs, les motivations, le niveau de visites, les objectifs à atteindre et la justification de la priorité. Puis, pour chaque marché cible, des programmes d'action sont détaillés en termes de produit, prix, accès, communication et promotion.

L'appendice I présente en détail l'offre du parc et l'appendice II indique des suggestions en vue d'améliorer l'analyse de marché et les recommandations de la stratégie marketing.

PART

A

Zins Beauchesne et Associés

Analyse et Planification Marketing

MARKET ANALYSIS
KOUCHIBOUGUAC
NATIONAL PARK

PART A

CONTRACT NO: ARO 88-27
MARKET ANALYSIS
PRESENTED TO:

THE CANADIAN PARKS SERVICE
ATLANTIC REGIONAL OFFICE
SOCIO-ECONOMIC SECTION

BY:

ZINS BEAUCHESNE AND ASSOCIATES
990, DE BOURGOGNE
SUITE 101
STE-FOY, QUEBEC
G1W 2L5

JULY 4 1989

MARKET ANALYSIS KOUCHIBOUGUAC NATIONAL PARK

PREPARED FOR

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ZINS BEAUCHESNE AND ASSOCIATES

990, DE BOURGOGNE
SUITE 101
STE-FOY, QUEBEC
G1W 2L5
(418) 657-2200

2005, PEEL
SUITE 1100
MONTREAL
H3A 3B8
(514) 843-8825

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EXECUTIVE SUMMARY

MARKET ANALYSIS
KOUCHIBOUGUAC NATIONAL PARK
EXECUTIVE SUMMARY
(PART A)

1.0 INTRODUCTION

Kouchibouguac National Park is located in South Eastern New Brunswick and is a natural attraction in Atlantic Canada. A large part of the park's visitation is from New Brunswick and in particular the park's surrounding region. The park's total visitation is in excess of 120,000 visits annually. The park main attractions are: the beach, outdoor recreation, nature interpretation and programs, camping and winter cross-country skiing.

1.1 STUDY PURPOSE

The purpose of this study was to segment, profile and analyze four market areas:

a) Area I - Current Park visitors
b) Area II - Highway 11 Tourists and Excursionists
c) Area III - New Brunswick Non Resident Tourists and Excursionists
d) Area IV - New Brunswick resident Tourists and Excursionists

An additional objective was to determine the characteristics, needs and expectation of all market segments included in the above market areas and to recommend how the Parks Service can better serve Kouchibouguac's current and potential visitors.

1.2 STRUCTURE OF THE REPORT

The report is structured in two parts. The first part (A) is the segmentation and profiling of Kouchibouguac four market areas. The second part (B) is based upon the results of part A and presents an analysis of the park offer in relation to market potentials and targets priorities. Specific marketing strategies are finally recommended for each target market in order to increase public awareness, appreciation and market capture of KNP and to better respond to current and potential park visitors needs and expectations.

1.3 STUDY METHODS

The research methods used were univariate, bivariate and multivariate statistical analyses of summer survey data completed during 1988 and winter survey data collected during 1986. Correspondence analysis was used as a multivariate technique to present graphical displays of contingency tables. Analyses of the resulting mappings allowed us to identify the market underlying structures (*a posteriori* segmentation) in terms of similarities in needs and expectations of current park visitors.

Analysis of potential visitors was based upon secondary data such as the New Brunswick Exit Survey of 1983, the Financial Post Survey of Markets 1986, Touriscope 1986 Domestic Travel Longwoods Research Group Inc. 1986 and Statistics Canada International Travel.

Strategic recommendations were based upon assessment of potential markets, current capture (or market penetration) and possible capture as defined in marketing principles and according to the theory of the diffusion of innovation.

1.4 MARKET SEGMENTATION

For the purpose of this study, market segmentation profiles were mainly based upon the geographic origin and visit purpose of summer parties. Winter visitors were analysed according to geographical origin. More detailed segmentation bases of current markets were also taken into account and presented graphically.

2.0 KOUCHIBOUGUAC NATIONAL PARK CURRENT MARKET

Kouchibouguac National Park has been visited by more than 120,000 visitors from January to December 1988. The summer season accounts for 64%, the winter season, 13% and the shoulder seasons 23%.

2.1 THE SUMMER MARKET

According to the summer survey of 1988, Kent County is the most important source of visitor parties (26.6%) followed by Other New Brunswick Counties, Quebec, Westmorland County, Ontario, U.S.A. and other countries, Atlantic except New Brunswick Northumberland County and Other Canada.

The general park customer profile indicates that 45.5% of parties are English speaking and that the main reasons for visit (in decreasing order) are: the beach, camping and sightseeing. The percentage of first visit is 39.5% and 46.3% of the visitor parties are aware of KNP conservation mandate. The main programs participated in (in decreasing order) are: the Visitor Reception Center (VCR) Boardwalk exhibits and VCR exhibits. The dominant party composition (in decreasing order) are: family with children and couple. The average party size is 3 persons and the main sources of trip information (in decreasing order) are: Friends and/or relatives, tourist bureau, and tourist guide.

The analysis of summer parties by origin has been examined on an a posteriori basis using the mapping approach. The interpretation of mappings indicates a global summer market structure of two segments with the following distinctive characteristics:

Segment 1: Parties from Kent, Northumberland and Other New Brunswick (51.8%)

- Prefer fun, personal well being and more sportive activities.
- Prefer family programs.
- Tend to be group of friends or families with children.

Segment 2: Parties from Quebec, Ontario, U.S.A. Westmorland *, and Atlantic (except New Brunswick) (48.2%).

- Prefer nature, scenic and less sportive activities.
- Prefer educational programs.
- Tend to be more in couples without children.

2.2 THE WINTER MARKET

According to the winter survey of 1986, the centre of Kent County is the most important source of visitors followed by visitors

---

* Westmorland is not always clearly associated with the second segment especially as regards summer programs.

coming from 10 to 25 kilometers, those coming from more than 25 kilometers, from Westmorland and from Other New Brunswick. Forty four percent of the day-time skiers are coming 1 to 5 times per month. Twenty seven percent of day-time skiers are spending one to one and a half hour in the park. Seventy seven percent of the visitors are coming for cross-country skiing. Weekend visitors account for 62% of the total. The dominant party composition (in decreasing order) is: alone, couple and group of friends.

The analysis of winter parties by origin has been examined on an a posteriori basis using the mapping approach. The examination of the mappings indicates a global winter market structure of three segments with the following distinctive characteristics:

Segment 1: Parties from Centre Kent (44%)

. Prefer weekdays visit of 1h30 at most.
. Prefer sightseeing and are skiing more than 5 times/month.
. Plan to come 20 times or more.
. Tend to be alone without children under 12.

Segment 2: Parties from middle Kent and Other Kent (34.9%)

. Prefer weekend visit of 1h30 to 3h.
. Use the waxing Chalet
. Plan to come less frequently than segment 1.
. Tend to be couples or friends.

Segment 3: Parties from Westmorland and Other New Brunwick (20%).

- . Are less frequent cross-country skiers.
- . Spend more than 3h in the park.
- . Tend to use the restaurant (Westmorland) or bring lunch (other N.B.).
- . Use the Reception Centre.
- . Plan to come less frequently than segment 2.
- . Tend to be family with children or groups.

2.3 THE ECONOMIC IMPACT

The economic impact of summer parties coming from outside Kent County is also examined. Results from the summer survey of 1988 indicated that the mean length of trip in New Brunswick was 5 days and that the mean time spent in Kent County was 3.48 days. The mean total expenditures per party for the stay in Kent County was $146.00. The total summer expenditures in Kent County was estimated at $2,488,371.00. The economic contribution is provided by party origin in terms of number of parties, time and dollars spent in Kent County. Hence, the relative contribution of parties from different origins can be examined in relation to number of parties, time and dollars spent in Kent County.

3.0 KOUCHIBOUGUAC NATIONAL PARK POTENTIAL MARKETS

SEGMENTATION AND PROFILING OF MARKET AREAS II, III AND IV WAS PREPARED WITH SECONDARY DATA

3.1 HIGHWAY 11 TOURISTS AND EXCURSIONISTS (MARKET AREA II)

Data from the New Brunswick auto exit survey of 1983 were used to characterize tourists and excursionists parties passing through on highway 11. Parties from Quebec were dominant, accounting for 36.2% of the total. Data for tourists and excursionists coming to Kent County were also available and indicated that 57.5% of those parties visited KNP.

3.2 NEW BRUNSWICK NON-RESIDENT TOURISTS AND EXCURSIONISTS (MARKET AREA III)

Non-resident tourists and excursionists were also identified from the New Brunswick auto exit survey of 1983. The non-resident tourists and excursionists profile was available in terms of parties geographical origin, kind of parties, number in party, type of accommodation, main expenses, language spoken, percent of first time visit, places of interest ever visited and activities interested in.

3.3 NEW BRUNSWICK RESIDENT TOURISTS AND EXCURSIONISTS (MARKET AREA IV).

The profile of New Brunswick residents trips was available in the New Brunswick Travel Data of 1984. These data were available in terms of person-trip about party composition, gender, distinction of New Brunswickers, type of accommodation, expenditures within and outside New Brunswick, activities participated in, period of the trip and region of destination.

4.0 CONCLUSION OF PART A

In this first part of the market analysis, KNP summer and winter markets are analyzed and profiled in terms of origin and trip purpose. A global segmentation structure of both markets is also suggested. In addition an economic impact analysis is provided for the summer market.

Secondary data from the New Brunswick auto exit survey of 1983 serve as a first base to profile and structure KNP potential demand. Further secondary data and analyses are introduced in part B of the report to quantify specific market captures and target markets penetration rates.

INTRODUCTION CHAPTER 1

1.0 INTRODUCTION

In line with the management process of Kouchibouguac National Park, part A of this report presents the results of segmentation profiling and analysis of:

- current park visitors (market area I);
- highway 11 Tourists and Excursionists (market area II);
- New Brunswick non resident Tourists and Excursionists (market area III);
- New Brunswick resident trips (market area IV).

Kouchibouguac National Park (KNP) usage represents a total of 129 528 visits from January to December 1988. During the summer season from (June 1st to August 31 st) 82 763 visits were observed for 64% of the total. During the winter season (from January 1st to March 31st) 16 839 visits were recorded for 13% of the total. During the shoulder seasons (from Apris 1st to May 31st and from September to December 31st 29 926 visits were recorded for 23% of the total.

The detailed structure of KNP current markets (market area I) presented in this report is based on the results of surveys conducted during the summer 1988 from July 8th to September 5th and during the winter 1986 from February 3rd to March 9th. Current markets profiles are presented for the summer season in terms of origin, economic impact and visit purpose. For the winter season, market profiles are presented according to origin.

The research approach to identify market segments for the summer season is similar to the one used for winter visitors. Univariate and bivariate statistical methods are first used to get a summary picture of the basic trends. Then, the multivariate statistical approach of correspondence analysis is used as a result of the scaling properties of most available survey data.

First, a segmentation by origin of visitor parties is performed using postal codes and zip codes (to identify U.S. origin). Detailed profiles of summer · survey parties by origin and their economic impact are presented together with the profile of parties segmented by visit purpose. A selection of survey variables is proposed for segmentation analysis. Selected variables are presented on an univariate basis indicating their relative importance. For example, relative participation of summer parties to programs are presented together with the relative degree of satisfaction of participants.

The following variables are selected for examination in relation to the origin of summer visitor parties: Summer activities, programs, trails, day use areas and services used, meaning of the park revealed by visitor parties comments.

Various mappings of visitor parties are presented in an attempt to find possible underlying structure of the summer market. Subgroups of various relative sizes are identified with their associated activity participation and services use.

The descriptive profile of winter visitor parties presented is based on: party composition, number of visitors in each party, number of children under 12 years old and geographical origin. Nine crosstabulations are performed and presented on restructured

variables. Various mappings of visitor parties are presented indicating the underlying structure of the winter market. Subgroups of different relative sizes are identified with their specific activities and park services used. Detailed analyses of market area I (for the summer market, the economic impact and the winter market) are presented in appendices A, B and C.

Segmentation profiling and analysis are then presented for highway 11 Tourists and Excursionists (market area II). New Brunswick Non Resident Tourists and Excursionists (market area III) are then reviewed. The profile of New Brunswick resident trips (market area IV) is then examined and a summary of current and potential demand is presented.

RESEARCH METHOD CHAPTER 2

2.0 RESEARCH METHOD

2.1 Summer market analysis

Data analysis for the identification of market segments is based on the summer survey data completed during 1988 by the Socio-Economic Analysis Section of the Canadian Parks Service, Environment Canada, Atlantic Regional Office. Interviews were conducted almost all days regardless of weather conditions between July 8 to September 5, 1988.

The three following questionnaires were used with the associated number of observations and variables:

SURVEY	NUMBER OF OBSERVATIONS	NUMBER OF VARIABLES
1. Traffic partition survey	7362	50
2. Visitor survey	515	144
3. Economic impact survey	496	87

The descriptive information from the traffic survey was merged with the visitor survey for the 515 common observations. The same procedure was used to associate the 496 economic impact observations with the traffic partition data.

The analysis of the visitor survey is performed with the associated traffic partition data. In addition to the descriptive variables included in the traffic survey, the visitor survey contains information about activities, programs, trails services, day use areas, information about the park, level of satisfaction with recreational activities, suggestions for improvement and meaning of Kouchibouguac National Park to the visitor's party.

The data file is first analysed on an univariate basis with the SAS software. A SAS coding is prepared to classify visitor parties by origin using postal codes. This procedure allows us to identify visitor parties from Kent, Northumberland and Westmorland counties. Besides, segmentation by origin, the main descriptive results of the visitor survey is presented and structured to make it easier to understand and to help the marketing planning process.

A detailed examination of univariate statistical results indicates that satisfaction level is not normally distributed, with "very statisfied" and "satisfied" being the dominant levels. With this kind of data, parametric statistical procedures are not applicable. Besides satisfaction level, most variables are measured on nominal scales and the appropriate bivariate analysis is crosstabulations.

The appropriate multivariate approach is correspondence analysis that simultaneously considers the relationships between rows and columns of a two-way contingency matrix. Correspondence analysis is analogous to a principal components analysis of the rows and columns of a contingency table.

A technical description can be found in D.L. Hoffman and G.R. Franke: "Correspondence Analysis Graphical Representation of Categorical Data in Marketing Research". Journal of Marketing Research, Vol XXIII (August 1986) 213-27. Basically the procedure is a singular value decomposition (Eigen Structure) of the matrix of chi-square distances derived from the contingency table.

A distinct advantage of correspondence analysis over other methods, in terms of obtaining a joint graphical display, is that correspondence analysis produces a dual display whose row and column geometrics have similar interpretation.

A variety of computer programs are available for carrying out a correspondence analysis. For the purpose of this project, data were processed with version 1.2 of SIMCA: a program to perform simple correspondence analysis.

2.2 Winter market analysis

Data analysis for the identification of market segments is based on the winter survey data completed between February 3 and March 9, 1986 by the Socio-Economic Analysis Section of the Canadian Parks Service, Environment Canada, Atlantic Regional Office. Interviews with visitor parties exiting from the Park were completed on all predetermined days during this period regardless of weather conditions and included interviews with 110 evening visitors and 650 day visitors for a total of 760.

The questionnaire used for the survey included descriptive data of the respondents and the following four sections. Section A contained background information on all park visitors, section B was addressed to skiers only, section C concerned non local visitors only (outside Kent county) and section D was completed for all visitors interviewed.

In addition to the questionnaire, univariate frequencies on the data were provided by the Socio-Economic Analysis Section. A data file and program was also made available to the consultant.

The research approach consisted of

1) understanding the structure of the data on an univariate basis
2) crosstabulate the data according to relevant a priori segmentation variables
3) choose an appropriate multivariate statistical technique to display graphically the data in low dimensional space.

A detailed examination of the questionnaire revealed that most variables were qualitative (measured on nominal or at best ordinal scales). With this type of data very few powerful multivariate statistical analyses are applicable. However, correspondence analysis is an attractive alternative in comparison to more traditional approaches such as multiple discriminant analysis.

2.3 Correspondence analysis

Correspondence analysis is an important component of this report and a good understanding of the technique is essential to be able to relate the analysis and the resulting mappings.

In this report, correspondence analysis is used for a posteriori segmentation and is performed on cross tabulations of party characteristics (a priori segmentation analysis). Analysis of these tables helps to understand the market structure by understanding contingency tables is when several rows and columns are to be examined simultaneously.

The correspondence procedure allows us to compare all rows and column profiles of each table in a space of low dimensions. The percentage of observations in each row and column is weighted by the rows and columns totals to derive comparable profiles. The resulting mapping must be interpreted by the analyst or the reader to be useful.

On the maps, market segments are indicated by capital letters. The location of each point on the map identifies its relative proximity to each segment. These proximities are interpreted like this: the closer a point (activity) to a segment, the more the activity is associated to a segment. For example, in figure 3.1, visitor parties from Kent County tend to prefer activities such as canoeing, swimming and sunbathing.

The horizontal and vertical axes are the underlying structural dimensions of the market or the underlying market segmentation basis. These dimensions should be interpreted with the following elements in mind:

- relative positions of characteristics and segments;

- percentage of weighted variance accounted by each axis (indicating the relative spread of the data along the axis) revealing the relative importance of the underlying dimension;

- the closeness of points from the center of the map. The closer the points (activities or segments) are to the centre of the figure the more typical they are of the average segment profile, So, in order to interpret the dimensions it is essential to examine the marginal points.

The interpretation of the underlying structural dimensions of figure 3.1 could results to:

- less sportive activities (top of Y axis);
- more sportive activities (bottom of Y axis);
- activities more related to nature (left of X axis);
- activities more related to fun and personal well-being (right of X axis).

SEGMENTATION PROFILING AND ANALYSIS OF MARKET AREA I (CURRENT PARK VISITORS)

CHAPTER 3

3.0 SEGMENTATION PROFILING AND ANALYSIS OF MARKET AREA I (CURRENT PARK VISITORS)

This part presents an overview of segmentation profiling of current park visitors market. Detailed research methods and results are presented in appendices A, B, C, and D.

3.1 Profile of summer visitor parties by origin

Summary profiles of summer visitor parties from each origin are presented in tables 3.1.1 to 3.1.9.

Visitors from Kent County account for 26.6% of KNP market followed in geographical order by (1):

- Westmorland (8,7%)
- Northumberland (4,3%)
- Other New Brunswick Counties (20,9%)
- Atlantic except New Brunswick (5%)
- Quebec (19,8%)
- Ontario (7,7%)
- Other Canada (0,9%)
- U.S.A. and other counties (6,1%)

---

(1) the identification of the origin of summer visitor parties was done on the basis of postal codes and zip codes

The percentage of French speaking parties is decreasing as their origin is further from the region of the park (except for Quebec where French is the dominant language with 91.3%). The percentage of first visit to KNP is increasing as the origin is further from the region of the park.

According to the origin of visitors, no distinctive (²) reason for the visit is highlighted. However the origin be the dominant (³) reasons are especially beach, sightseeing and camping.

(²) Distinctive: reasons of visit that are not shared by all summer parties from different origin.

(³) Dominant: main reasons of visit shared by all summer parties from different origin.

ACTIVITIES PARTICIPED IN

A crosstabulation of origin of visitor parties with summer activities indicates that some activities are popular for all visitors such as sunbathing, swimming and beachwalk and some activities such as fishing, boating and canoeing are less popular. It is however difficult to detect any clear relationship between summer activities and origin. A correspondence analysis is then applied to the data, and results are presented in a graphical display (Figure 3.1) that summarizes the information.

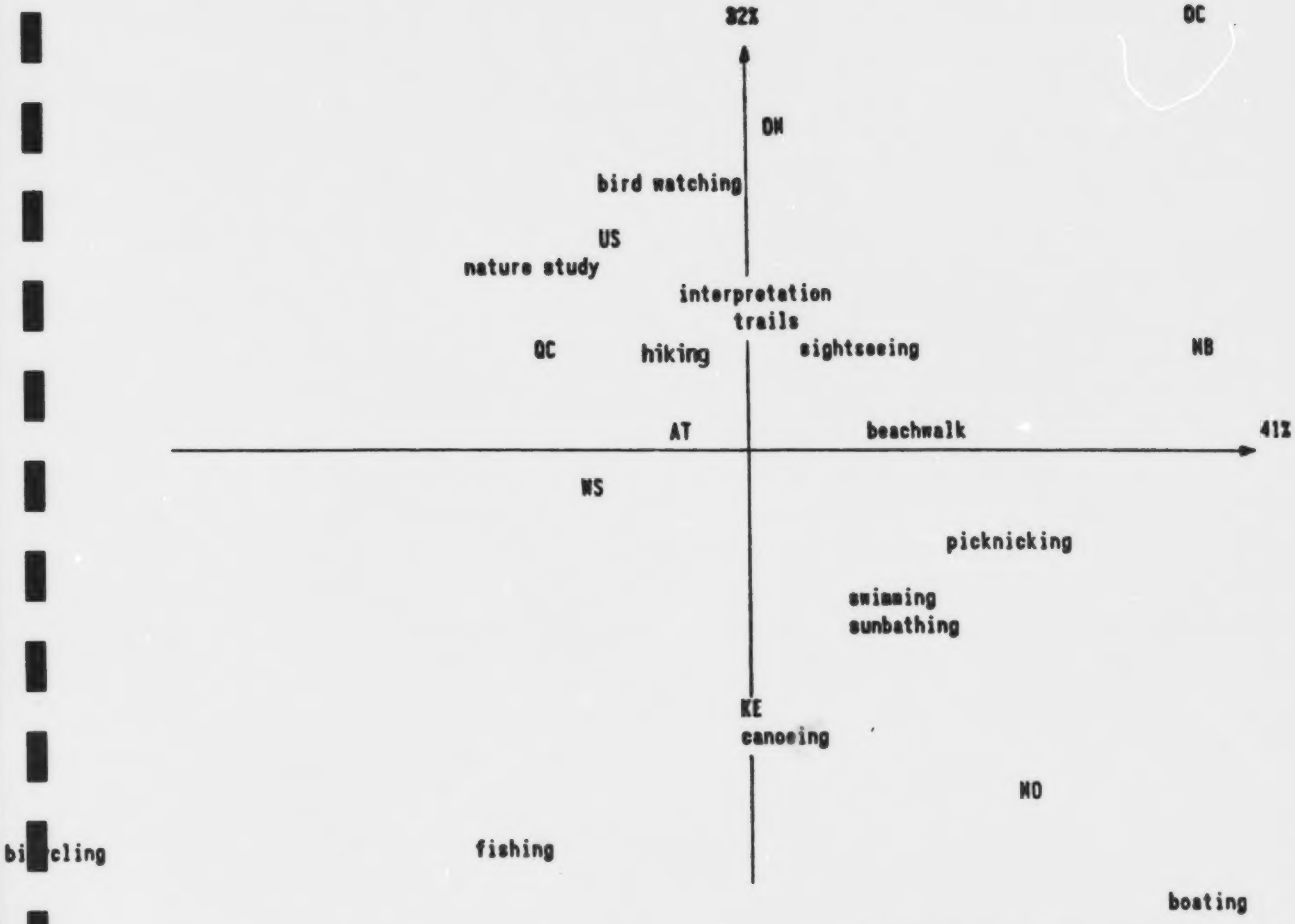
In figure 3.1, the closer an activity to a segment, the more likely the participation of the segment in the activity. The horizontal axis seems to represent activities more related to nature on the left and activities more related to fun and well being on the right. The vertical axis can be interpreted as a decreasing degree of sportiveness, more sportive activities being in the lower part of the figure and less sportive activities being in the upper part. In addition to the relative distances between market segments and activities, their relative closeness to the centre of the figure indicates how typical the market or the activity is from the average.

According to the market structure emerging from figure 3.1, two clusters seem to emerge (the lower right of the figure with KE, NO and NB and the upper left with QC, US, ON, WS). Therefore, an overall structure of two segments is suggested:

Parties from Kent (KE), Northumberland (NO) and other New Brunswick (NB) tend to prefer more sportive activities such as canoeing, boating, and activities more related to fun and personal well being (beachwalk, swimming-sunbathing and picnicking).

FIGURE 3.1

MAPPING OF SUMMER PARTIES ACCORDING TO ORIGIN AS A FUNCTION OF ACTIVITIES IN THE PARK



LEGEND	% PARTIES
KE: Kent	26.6%
WS: Westmorland	8.7%
NO: Northumberland	4.3%
NB: Other New Brunswick	20.9%
AT: Atlantic	5.0%
QC: Quebec	19.8%
ON: Ontario	7.7%
OC: Other Canada	0.9%
US: U.S.A.	6.1%

ACTIVITIES	% PARTIES
Beachwalk	87.0%
Sightseeing	75.1%
Sunbathing-swimming	75.0%
Picnicking	65.2%
Interpretation trails	58.4%
Nature study	53.5%
Hiking	47.0%
Bird watching	45.9%
Bicycling	38.0%
Canoeing	21.4%
Boating	15.5%
Fishing	3.9%

Visitor parties from Quebec (QC), U.S.A. (US), Ontario (ON), Westmorland (WS) and Atlantic except New Brunswick (AT) are more likely to prefer activities related to nature (nature study, birdwatching) and less sportive activities (interpretation trails, hiking, sightseeing.

PROGRAMS PARTICIPATED IN

A crosstabulation of party origins with summer programs reveals that some programs are less popular for all visitors (such as the puppet show) but no clear relationship between these items is detected. Therefore, a correspondence analysis is performed leading to figure 3.2. The interpretation of this figure is made in the same manner as figure 3.1. The closer a program to a market, the more likely is the market to participate in such a program. The underlying market structure of two segments in figure 1 tend to be confirmed in figure 3.2.

Visitor parties from Kent (KE), Northumberland (NO) and other New Brunswick (NB) tend to prefer family outing and fun programs such as special event, campfires, puppet show.

Visitors from Quebec (QC), U.S.A. (US), Ontario (ON), Westmorland (WS)* and Atlantic except New Brunswick (AT) are more likely to prefer more educational programs such as Visitor Reception Centre exhibits, audiovisual show, evening programs, boardwalk exhibits.

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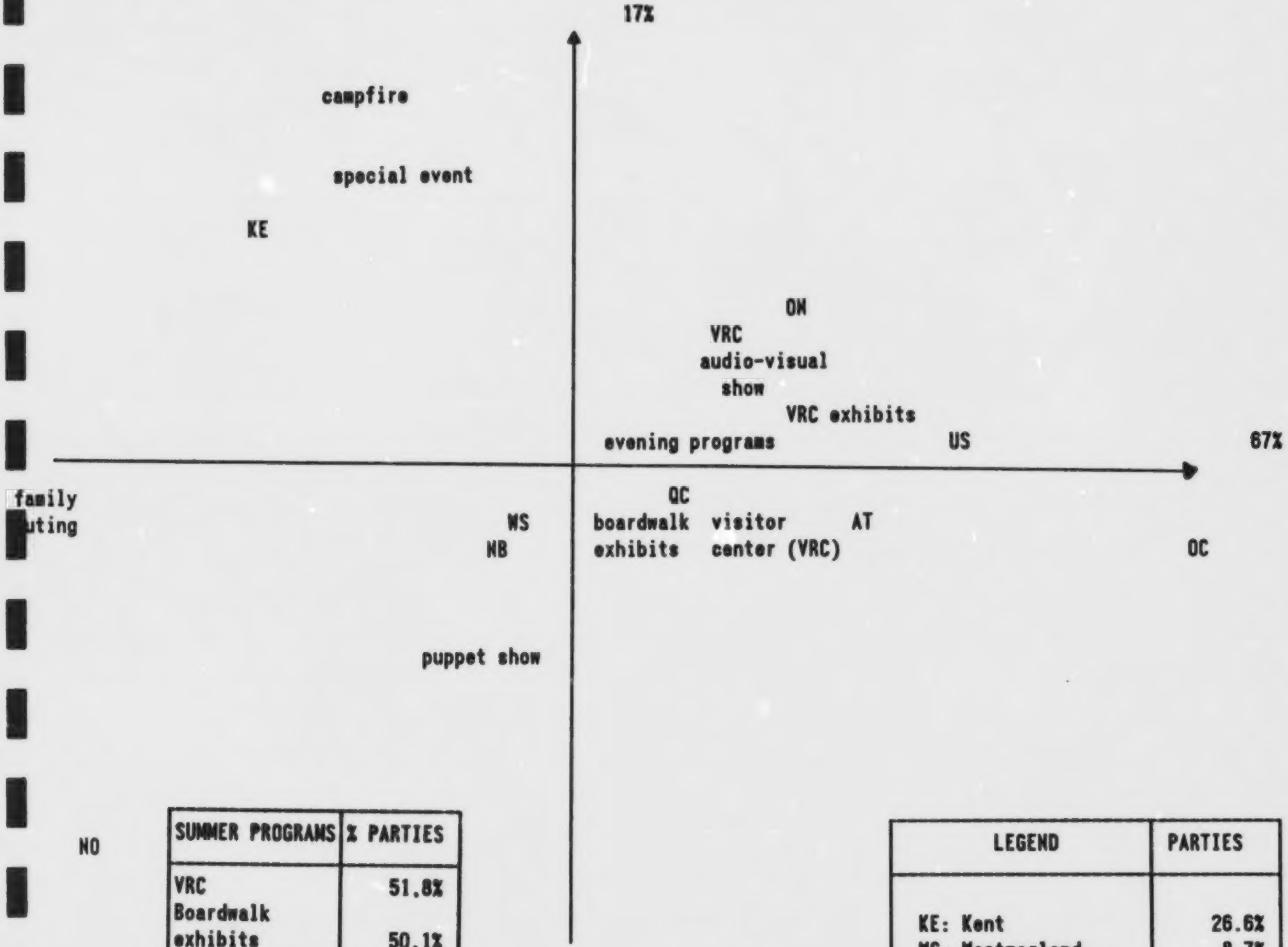
* Westmorland parties are less clearly associated with the second segment than in figure 1.

FIGURE 3.2

MAPPING OF SUMMER VISITORS ACCORDING

TO ORIGIN IN RELATION TO SUMMER PROGRAMS



SUMMER PROGRAMS	% PARTIES
VRC	51.8%
Boardwalk exhibits	50.1%
VRC exhibits	32.5%
Family outing	25.7%
VRC audio-visual	20.5%
Evening programs	14.7%
Puppet show	13.0%
Campfire	12.8%
Special event	4.4%

LEGEND	PARTIES
KE: Kent	26.6%
WS: Westmorland	8.7%
NO: Northumberland	4.3%
NB: Other New Brunswick	20.9%
AT: Atlantic	5.0%
QC: Quebec	19.8%
ON: Ontario	7.7%
OC: Other Canada	0.9%
US: U.S.A.	6.1%

TRAILS, DAY USE AREAS AND SERVICES USED

The graphical display of the data in crosstabulations of origin by trails, day use areas and services used seems to confirm the underlying structure of the market:

Segment 1 (KE, NO, NB) is connected with day use areas related with beach, swimming-sunbathing and picnicking.

Segment 2 (QC, US, AT) is more related to trails connected with nature study.

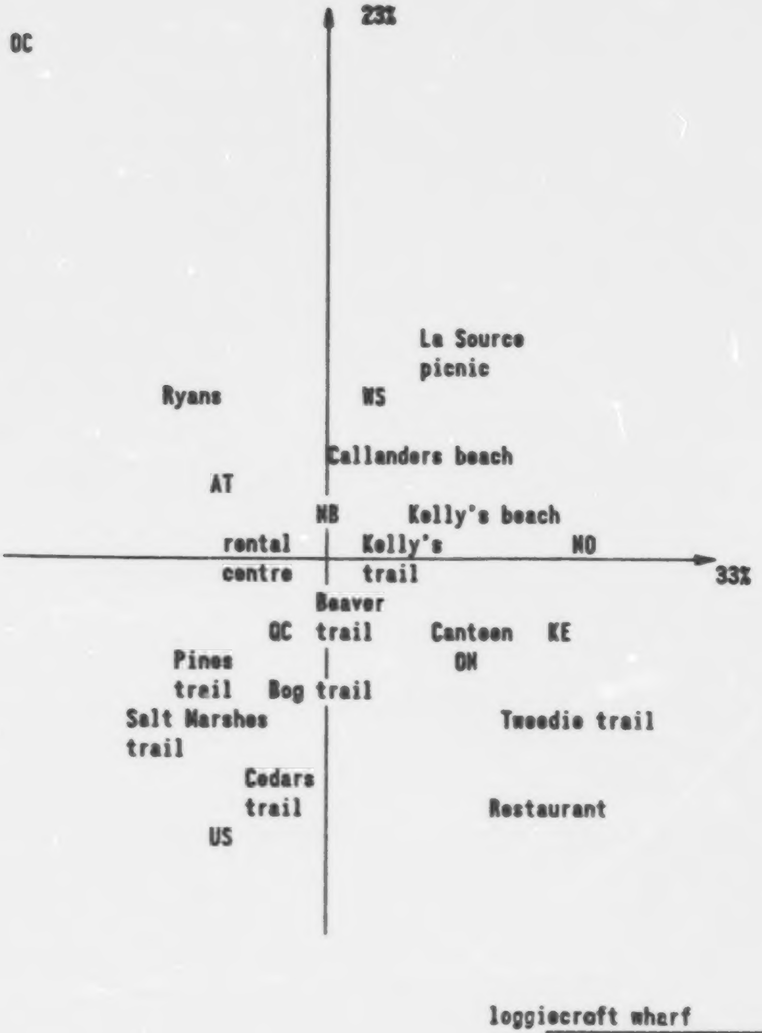
(see figure 3.3)

PARK EVALUATION

A graphical display, resulting from correspondence analysis applied to the data of a crosstabulation of summer parties as a function of park evaluation, reveal consistent results with the previous ones. Kent visitors are associated with fun vacation and Quebec, Ontario, US and Atlantic (except New Brunswick) visitor parties are more related with the scenic and natural aspects (see figure 3.4).

FIGURE 3.3

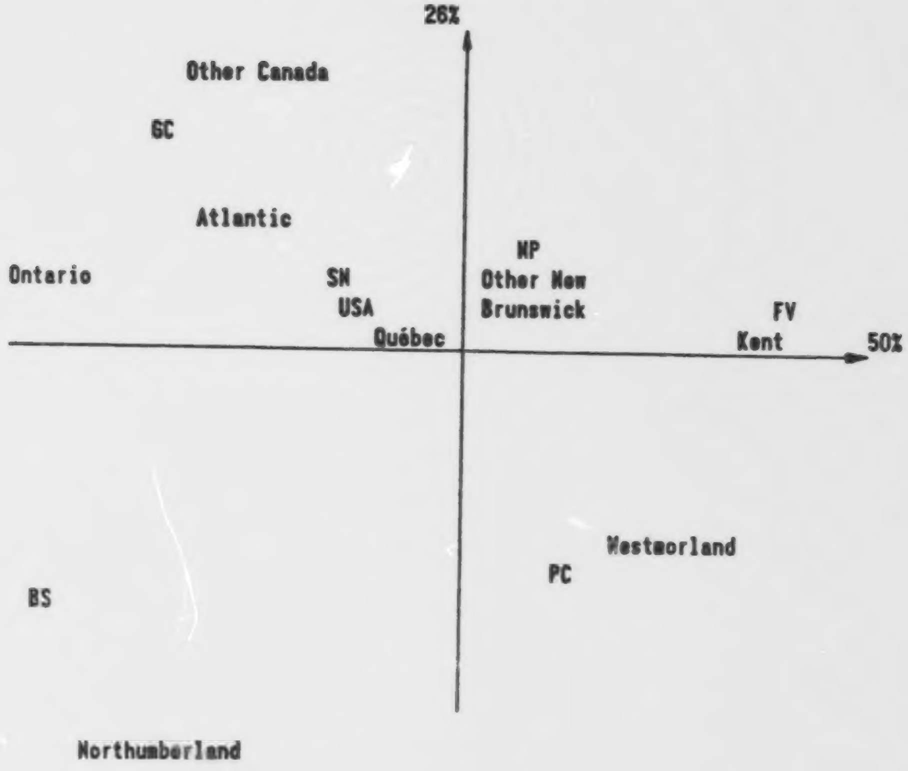
MAPPING OF SUMMER PARTIES ACCORDING TO ORIGIN IN RELATION TO TRAILS, DAY USE AREAS AND SERVICES USED



LEGEND	% PARTIES
KE: Kent	26.8%
WS: Westmorland	8.7%
NO: Northumberland	4.3%
NB: Other New Brunswick	20.9%
AT: Atlantic	5.0%
QC: Quebec	19.8%
ON: Ontario	7.7%
OC: Other Canada	0.9%
US: U.S.A.	6.1%

FIGURE 3.4

MAPPING OF SUMMER PARTIES ACCORDING TO PARK EVALUATION IN RELATION TO ORIGIN



LEGEND	% PARTIES
BS: Beach-swimming	7.6%
PC: Peaceful	18.9%
NP: Nice Park	26.0%
GC: Good camping	6.0%
SN: Scenic Nature	25.2%
FV: Fun vacation	16.3%

PARTY COMPOSITION

As regards party composition, visitors from Kent, Northumberland and Westmorland are more likely to be group of friends or family with children. Visitors from Ontario, Quebec and U.S.A. tend to be more often in couples without children (see figure 3.5.)

SUMMARY OF FINDINGS

The analysis of summer parties by origin has been examined on an a posteriori basis using the mapping approach.

The interpretation of mappings indicate a global summer market structure of two segments with the following distinctive characteristics:

Segment 1: Parties from Kent, Northumberland and Other New Brunswick (51,8%)

- Prefer fun, personal well being and more sportive activities.
- Prefer family programs.
- Tend to be group of friends or families with children.

Segment 2: Parties from Quebec, Ontario, U.S.A., Westmorland * and Atlantic (except New Brunswick) (48,2%):

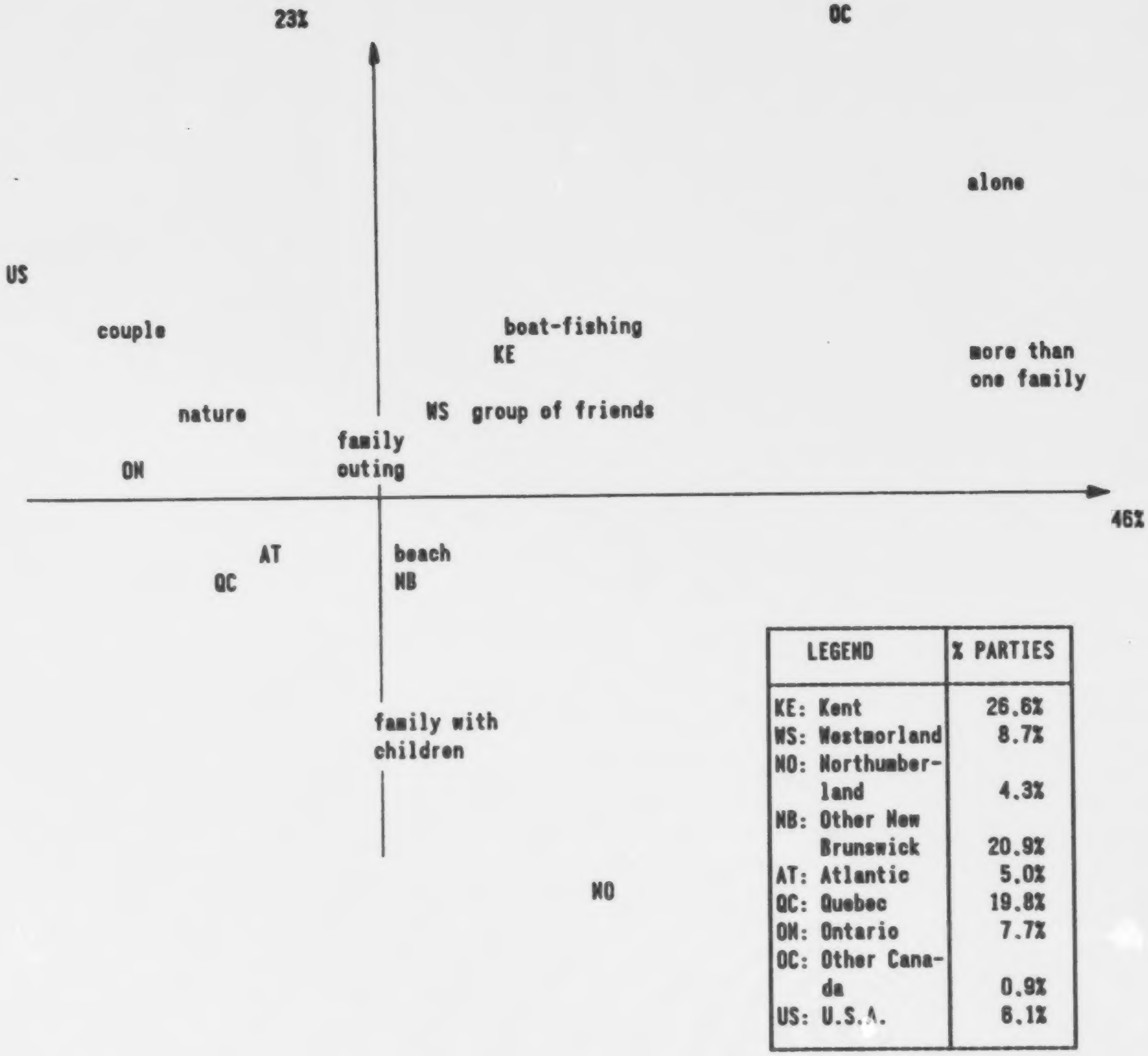
- Prefer nature, scenic and less sportive activities.
- Prefer educational programs.
- Tend to be more in couples without children.

---

* Westmorland is not always clearly associated with the second segment especially as regards summer programs.

FIGURE 3.5

MAPPING OF SUMMER PARTIES ACCORDING TO ORIGIN IN RELATION TO TYPE OF ACTIVITIES AND PARTY COMPOSITION



LEGEND	% PARTIES
KE: Kent	26.6%
WS: Westmorland	8.7%
NO: Northumberland	4.3%
NB: Other New Brunswick	20.9%
AT: Atlantic	5.0%
QC: Quebec	19.8%
ON: Ontario	7.7%
OC: Other Canada	0.9%
US: U.S.A.	6.1%

The detailed univariate profiles of summer parties are now presented by origin in tables 3.1.1 to 3.1.9. Each table contains the specific profile of summer parties from one origin at a time. The advantage of these profiles is that they give detailed results for each subgroup of parties. However, their weakness is that they do not make it easy to uncover a global market structure such as the one revealed by the mapping approach.

The difference between the information provided by specific subgroup profiles and the mappings is like the difference of information a tourist visitor gets in an unknown city exploring one street at a time rather than looking at an overall map of the city monuments and points of interest.

TABLE 3.1.1

PROFILE OF SUMMER PARTIES FROM KENT COUNTY

Size of market (number of parties):	5539
Percent of KNP market:	26.6%
Market rank in number of parties: (out of 9)	1st
Percent French (English) speaking:	82.3% (17.7%)
Activities participated in:	
- Dominant (in decreasing order)	.Beachwalk, sunbathing-swimming, picknicking.
- Distinctive (in decreasing order)	.Fishing, boating, canoeing
Main reasons for visit:	.Beach, sightseeing, camping
Percent of first (repeat) visit:	6% (94%)
Programs participated in:	
- Dominant (in decreasing order)	.Boardwalk exhibits, family outing, VRC.
- Distinctive (in decreasing order)	.Special event, campfire
Dominant evaluations of KNP: (in decreasing order):	Nice park, fun vacation, peaceful calm
Awareness of mandate:	42.5%
Party composition:	
- Dominant (in decreasing order)	.Family with children, couple, alone
- Distinctive (in decreasing order)	.Group of friends
Average party size	3 persons

PROFILE OF SUMMER PARTIES FROM KENT COUNTY
(CONTINUED)

Average length of stay in Kent County and rank (out of 8):	Not applicable
Average expenditure per day in Kent County and rank:	Not applicable
Source of trip information:	.Friends and/or relatives, already knew the park
Improvements suggested: transportation, commercial	.Campsite facilities, activities

TABLE 3.1.2

PROFILE OF SUMMER PARTIES FROM NORTHUMBERLAND COUNTY

Size of market (number of parties):	885
Percent of KNP market:	4.3%
Market rank in number of parties: (out of 9)	8th
Percent French (English) speaking:	26.3%, 73.7%)
Activities participated in:	
- Dominant (in decreasing order)	.Sunbathing-swimming, beachwalk, sightseeing
- Distinctive (in decreasing order)	.Boating
Main reasons for visit:	Beach, camping and sightseeing
Percent of first (repeat) visit:	10.5% (89.5%)
Programs participated in:	
- Dominant (in decreasing order)	.Boardwalk exhibits, family outing, VRC and puppet show
- Distinctive (in decreasing order)	.None
Dominant evaluations of KNP:	.Peaceful-calm, beach-swimming, scenic-nature
Awareness of mandate:	57.9%
Party composition:	
- Dominant (in decreasing order)	.Family with children, more than one family, couple and group of friends
- Distinctive (in decreasing order)	.Family with children

PROFILE OF SUMMER PARTIES FROM NORTHUMBERLAND COUNTY (CONTINUED)

Average party size:	3.9 persons
Average length of stay in Kent County and rank (out of 8):	3.53 days (3rd)
Average expenditure per day in Kent County and rank:	$48.62 (2nd)
Source of trip information:	.Friends and/or relatives, advertisement (newspapers, TV, radio)
Improvements suggested:	.Beach facilities, park publicity, recreational activities

TABLE 3.1.3

PROFILE OF SUMMER PARTIES FROM WESTMORLAND COUNTY

Size of market (number of parties):	1817
Percent of KNP market:	8.7%
Market rank in number of parties: (out of 9)	4th
Percent French (English) speaking:	51.3%, 48,7%
Activities participated in:	
- Dominant (in decreasing order)	.Beachwalk, picknicking, sightseeing
- Distinctive (in decreasing order)	.Bicycling, hiking
Main reasons for visit:	.Beach, sightseeing, camping
Percent of first (repeat) visit:	15.4% (84.6%)
Programs participated in:	
- Dominant (in decreasing order)	.VRC, boardwalk exhibits, family outing
- Distinctive (in decreasing order)	.Special event, evening program
Dominant evaluations of KNP:	.Peaceful-calm, nice park
Awareness of mandate:	53.8%
Party composition:	
- Dominant (in decreasing order)	.Family with children, couple, more than one family
- Distinctive (in decreasing order)	.Group of friends
Average party size:	3 persons

PROFILE OF SUMMER PARTIES FROM WESTMORLAND COUNTY (CONTINUED)

Average length of stay in Kent County and rank (out of 8):	2.55 days (7th)
Average expenditure per day in Kent County and rank:	$52.25 (1st)
Source of trip information:	.Friends and/or relatives, already knew the park
Improvements suggested:	.Campsite facilities, pleased with present activities

TABLE 3.1.4

PROFILE OF SUMMER PARTIES FROM OTHER NEW BRUNSWICK

Size of market (number of parties):	4351
Percent of KNP market:	20.9%
Market rank in number of parties: (out of 9)	2nd
Percent French (English) speaking:	36.4% (63.6%)
Activities participated in:	
- Dominant (in decreasing order)	.Beachwalk, picknicking, sunbathing-swimming
- Distinctive (in decreasing order)	.Sightseeing
Main reasons for visit:	.Beach, camping and sightseeing
Percent of first (repeat) visit:	36.4% (63.6%)
Programs participated in:	
- Dominant (in decreasing order)	.VRC, VRC exhibit, boardwalk exhibits
- Distinctive (in decreasing order)	.Puppet show
Dominant evaluations of KNP:	.Nice park, scenic-nature, peaceful-calm.
Awareness of mandate:	41.8%
Party composition:	
- Dominant (in decreasing order)	.Family with children, couple, group of friends
- Distinctive (in decreasing order)	.None
Average party size:	3.2 persons

PROFILE OF SUMMER PARTIES FROM OTHER NEW BRUNSWICK (CONTINUED)

Average length of stay in Kent County and rank (out of 8):	4.80 days (1st)
Average expenditure per day in Kent County and rank:	$29.05 (8th)
Source of trip information:	.Friends and/or relatives, advertisement (newspaper TV, radio)
Improvements suggested:	.Beach facilities, park publicity, recreational activities

3.1.5
PROFILE OF SUMMER PARTIES FROM OTHER ATLANTIC

Size of market (number of parties):	1047
Percent of KNP market:	5.0%
Market rank in number of parties: (out of 9)	7th
Percent English speaking:	100%
Activities participated in:	
- Dominant (in decreasing order)	.Beachwalk, sightseeing, sunbathing-swimming
- Distinctive (in decreasing order)	.Interpretation trails, hiking
Main reasons for visit:	.Camping, beach, sightseeing
Percent of first (repeat) visit:	64.9% (35.1%)
Programs participated in:	
- Dominant (in decreasing order)	.VRC, VRC exhibit, boardwalk exhibits
- Distinctive (in decreasing order)	.Evening programs
Dominant evaluations of KNP:	.Scenic-nature, fun vacation good camping
Awareness of mandate:	40.1%
Party composition:	
- Dominant (in decreasing order)	.Family with children, couple, group of friends
- Distinctive (in decreasing order)	.None
Average party size:	3.2 persons

PROFILE OF SUMMER PARTIES FROM OTHER ATLANTIC (CONTINUED)

Average length of stay in Kent County and rank (out of 8):	3.18 days (6th)
Average expenditure per day in Kent County and rank:	$37.36 (4th)
Source of trip information:	.Friends and/or relatives, tourist guide
Improvements suggested:	.Park publicity, campsite facilities, commercial activities

TABLE 3.1.6

PROFILE OF SUMMER PARTIES FROM QUEBEC

Size of market (number of parties):	4111
Percent of KNP market:	19.8%
Market rank in number of parties: (out of 9)	3rd
Percent French (English) speaking:	91.3% (8.7%)
Activities participated in:	
- Dominant (in decreasing order)	.Beachwalk, sunbathing-swimming, sightseeing
- Distinctive (in decreasing order)	.Nature study, hiking
Main reasons for visit:	.Beach, camping, sightseeing
Percent of first (repeat) visit:	66.3% (33.7%)
Programs participated in:	
- Dominant (in decreasing order)	.VRC, boardwalk exhibits, VRC exhibits
- Distinctive (in decreasing order)	.Evening programs
Dominant evaluations of KNP:	.Scenic-nature, nice park, peaceful-calm
Awareness of mandate:	63.4%
Party composition:	
- Dominant (in decreasing order)	.Family with children, couple, group of friends
- Distinctive (in decreasing order)	.None
Average party size:	3 persons

PROFILE OF SUMMER PARTIES FROM QUEBEC (CONTINUED)

Average length of stay in Kent County and rank (out of 8):	3.49 days (4th)
Average expenditure per day in Kent County and rank:	$40.40 (3rd)
Source of trip information:	.Friends and/or relatives, tourist bureau, tourist guide
Improvements suggested:	.Commercial activities, campsite facilities, transportation

TABLE 3.1.7

PROFILE OF SUMMER PARTIES FROM ONTARIO

Size of market (number of parties):	1603
Percent of KNP market:	7.7%
Market rank in number of parties: (out of 9)	5th
Percent French (English) speaking:	15.3% (84.7%)
Activities participated in:	
- Dominant (in decreasing order)	.Beachwalk, sightseeing, sunbathing-swimming
- Distinctive (in decreasing order)	.Birdwatching
Main reasons for visit:	.Camping, beach, sightseeing
Percent of first (repeat) visit:	69.5% (30.5%)
Programs participated in:	
- Dominant (in decreasing order)	.VRC, VRC exhibit, boardwalk exhibits
- Distinctive (in decreasing order)	.Audio-visual show
Dominant evaluations of KNP:	.Scenic-nature, nice park, beach swimming
Awareness of mandate:	42.4%
Party composition:	
- Dominant (in decreasing order)	.Couple, family with children, group of friends
- Distinctive (in decreasing order)	.Couple
Average party size:	3 persons

PROFILE OF SUMMER PARTIES FROM ONTARIO (CONTINUED)

Average length of stay in Kent County and rank (out of 8):	3.29 days (5th)
Average expenditure per day in Kent County and rank:	$32.14 (7th)
Source of trip information:	.Friends and/or relatives, tourist bureau, tourist guide
Improvements suggested:	.Campsite facilities, commercial activities, park publicity

TABLE 3.1.8

PROFILE OF SUMMER PARTIES FROM OTHER CANADA

(Since this profile is based on a small number of unweighted observations, it should be examined with caution)

Size of market (number of parties):	187
Percent of KNP market:	0.9%
Market rank in number of parties: (out of 9)	9th
Percent French (English) speaking:	0%
Activities participated in:	
- Dominant (in decreasing order)	.Too few observations
- Distinctive (in decreasing order)	
Main reasons for visit:	.Camping, sightseeing
Percent of first (repeat) visit:	100% (0%)
Programs participated in:	
- Dominant (in decreasing order)	.Too few observations
Distinctive (in decreasing order)	
Dominant evaluations of KNP:	.Scenic-nature, nice park,
Awareness of mandate:	33.3%
Party composition:	
- Dominant (in decreasing order)	.Too few observations
- Distinctive (in decreasing order)	
Average party size:	4 persons
Average length of stay in Kent County and rank (out of 8):	2.33 days (8th)

PROFILE OF SUMMER PARTIES FROM OTHER CANADA (CONTINUED)

Average expenditure per day in Kent County and rank:	$35.00 (5th)
Source of trip information:	Too few observations
Improvements suggested:	.Park publicity

TABLE 3.1.9

PROFILE OF SUMMER PARTIES FROM THE U.S.A.

Size of market (number of parties):	1263
Percent of KNP market:	6.1%
Market rank in number of parties: (out of 9)	6th
Percent French (English) speaking:	2.9% (97.1%)
Activities participated in:	
- Dominant (in decreasing order)	.Beachwalk, sightseeing, interpretation trails
- Distinctive (in decreasing order)	.Birdwatching
Main reasons for visit:	.Beach, camping, sightseeing
Percent of first (repeat) visit:	76.3% (23.7%)
Programs participated in:	
- Dominant (in decreasing order)	.VRC, boardwalk exhibits, VRC exhibit
Distinctive (in decreasing order)	.Evening programs
Dominant evaluations of KNP:	.Nice park, scenic-nature, peaceful-calm
Awareness of mandate:	28.8%
Party composition:	
- Dominant (in decreasing order)	.Couple, family with children, group of friends
- Distinctive (in decreasing order)	.Couple
Average party size:	2.6 persons

PROFILE OF SUMMER PARTIES FROM THE U.S.A.

(CONTINUED)

Average length of stay in Kent County and rank (out of 8):	4.04 days (2nd)
Average expenditure per day in Kent County and rank:	$34.95 (6th)
Source of trip information:	.Friends and/or relatives, park already known
Improvements suggested:	.Park publicity, campsite facilities, transportation

3.2 Profile of summer parties economic impact by origin (Kent county excluded)

In the economic impact survey, only parties from outside Kent county were included in the analysis since the assumption is made that Kent residents do not make additional contribution to the economic impact as a result of the presence of the park.

Several variables were included in the economic impact analysis by origin:

- Total length of trip;
- Length of trip in Kent County;
- Expenditures during the whole trip;
- Expenditures in Kent County.

Tables 3.2.1 to 3.2.9 present the results for these variables for each origin. To compare the number of parties, trip days and expenditures on the same total basis of 17 049 parties (with Kent parties excluded), a correction coefficient is used. Four ratios are computed in order to evaluate the relative economic contribution of each region.

Parties origin present interesting result. The two largest markets are Quebec (25.9%) and other New Brunswick (22.4%). But, the most important fact to note is that:

.45% of parties (outside from Kent) came from New Brunswick;
.90% of parties (outside from Kent) came from Canada.

Considering the average expenditures per day, it appears again that Kent County does not favor tourist spending. The average per diem expense by parties during their trip to Kent County is $41.00, half of the average amount spent per day during the whole trip.

Parties that stay the longest time in Kent County during their trip are other New Brunswick and U.S.A. On the other hand, Westmorland, Foreign and Other Canada spent the least time in the county.

Otherwise, parties from: Northumberland, U.S.A., Quebec and other New Brunswick spent the highest average amount of money and parties coming from Westmorland, Other Canada and Foreign spent the lowest amount.

An examination of the ratios reveal that:

- Time spent in Kent County is higher than 40% of total trip days for New Brunswick parties.
- Time spent in Kent County is lower than 40% of total trip days for: Foreign, Ontario, Atlantic, Quebec and U.S.A. parties.
- $ spent in Kent County is higher than 20% of total trip expenditures for U.S.A., Westmorland, Quebec and Atlantic parties.
- $ spent in Kent County is smaller than 20% of total trip expenditures for Ontario, Foreign and Other Canada parties.

The ratios concerning the percentage of time spent in Kent county and the percentage of total trip expenditures for Westmorland parties are similar (40% vs 37%). Considering the same ratios for the U.S.A. parties, we note that the percentage of total trip expenditures (43%) is higher than the time spent in Kent county (36%). This last situation is in opposition with the one observed for parties from all origins where the percentage of time spent in Kent county is twice the percentage of total trip expenditures in the county.

However, although it seems that the U.S.A. market is the more lucrative one, this is not the case. Indeed, if we consider the average expenditures, we see that Americans spend $35.00 per day in the county, $6.00 less than the average parties. This difference should be given some further thought and analysis, based on some more detailed data which could be collected in the future.

In order to properly evaluate the economic impact of each region on Kent county it is essential that several variables be considered. The following profiles lead to a better understanding and a better evaluation of the economic impact of each region. After the presentation of tables 3.2.1 to 3.2.9 an overall summary of the economic impact of the different origin will be presented in figures 3.2.1 and 3.2.2.

TABLE 3.2.1

REGION: WESTMORLAND

SUMMER SURVEY FROM JULY 8TH TO SEPTEMBER 5TH 1989

(NUMBER OF WEIGHTED PARTIES = 1936, 12.5%)

TOTAL TRIP DAYS	Sum =	10888 days
	Unweighted mean =	6 days
NEW BRUNSWICK TRIP DAYS	Mean =	3.8 days
KENT COUNTY TRIP DAYS	Sum =	4436 days
	Unweighted mean =	2.55 days
TOTAL PARTY TRIP EXPENDITURES	($) Sum =	$620,043.
	Unweighted mean =	$ 439.30.
KENT COUNTY EXPENDITURES	($) Sum	$231,750.
	Unweighted mean =	$ 52.25.

RATIOS

1- Percentage of time (total trip days) spent in Kent County = 40.74%

2- Percentage of total party trip expenditures spent in Kent County = 37.37%

3- Average expenditures per day per party during the whole trip = $56.95

4- Average expenditures per day per party spent in Kent County = $52.25

TABLE 3.2.2

REGION: NORTHUMBERLAND

SUMMER SURVEY FROM JULY 8TH TO SEPTEMBER 5TH 1989

(NUMBER OF WEIGHTED PARTIES = 1452, 9.4%)

TOTAL TRIP DAYS Sum = 11170 days
Unweighted mean = 7.9 days

NEW BRUNSWICK TRIP DAYS Mean = 4.66 days

KENT COUNTY TRIP DAYS Sum = 4557 days
Unweighted mean = 3.53 days

TOTAL PARTY TRIP EXPENDITURES ($)
Sum = $978,011.
Unweighted mean = $ 866.10

KENT COUNTY EXPENDITURES ($)
Sum $221,548.
Unweighted mean = $ 189.45.

RATIOS

1- Percentage of time (total trip days) spent in Kent County = 40.79%

2- Percentage of total party trip expenditures spent in Kent County = 22.65%

3- Average expenditures per day per party during the whole trip = $87.55

4- Average expenditures per day per party spent in Kent County = $48.62

TABLE 3.2.3

REGION: OTHER NEW BRUNSWICK

SUMMER SURVEY FROM JULY 8TH TO SEPTEMBER 5TH 1989

(NUMBER OF WEIGHTED PARTIES = 3468, 22.4%)

TOTAL TRIP DAYS	Sum =	28671 days
	Unweighted mean =	8.88 days
NEW BRUNSWICK TRIP DAYS	Mean =	5.93 days
KENT COUNTY TRIP DAYS	Sum =	12985 days
	Unweighted mean =	4.80 days
TOTAL PARTY TRIP EXPENDITURES	($)	
	Sum =	$1,790.486.
	Unweighted mean =	$ 716.15.
KENT COUNTY EXPENDITURES	($)	
	Sum	$377,284.
	Unweighted mean =	$ 146.18.

RATIOS

1- Percentage of time (total trip days) spent in Kent County = 45.28%

2- Percentage of total party trip expenditures spent in Kent County = 21.07%

3- Average expenditures per day per party during the whole trip = $62.45

4- Average expenditures per day per party in Kent County = $29.05

TABLE 3.2.4

REGION: ATLANTIC

SUMMER SURVEY FROM JULY 8TH TO SEPTEMBER 5TH 1989

(NUMBER OF WEIGHTED PARTIES = 1066, 6.9%)

TOTAL TRIP DAYS	Sum =	8251 days
	Unweighted mean =	7.97 days
NEW BRUNSWICK TRIP DAYS	Mean =	4.61 days
KENT COUNTY TRIP DAYS	Sum =	2989 days
	Unweighted mean =	3.18 days
TOTAL PARTY TRIP EXPENDITURES	($)	
	Sum =	$459,731.
	Unweighted mean =	$ 611.75
KENT COUNTY EXPENDITURES	($)	
	Sum	$111,689.
	Unweighted mean =	$ 142.65.

RATIOS

1-	Percentage of time (total trip days) spent in Kent County =	36.22%
2-	Percentage of total party trip expenditures spent in Kent County =	25.42%
3-	Average expenditures per day per party during the whole trip =	$55.71
4-	Average expenditures per day per party spent in Kent County =	$37.36

TABLE 3.2.5

REGION: QUEBEC

SUMMER SURVEY FROM JULY 8TH TO SEPTEMBER 5TH 1989

(NUMBER OF WEIGHTED PARTIES = 4006, 25.9%)

TOTAL TRIP DAYS	Sum =	35394 days
	Unweighted mean =	9.11 days
NEW BRUNSWICK TRIP DAYS	Mean =	5.35 days
KENT COUNTY TRIP DAYS	Sum =	12609 days
	Unweighted mean =	3.49 days
TOTAL PARTY TRIP EXPENDITURES	($) Sum =	$2,291.673.
	Unweighted mean =	$ 764.23.
KENT COUNTY EXPENDITURES	($) Sum	$509,209.
	Unweighted mean =	$ 163.13.

RATIOS	
1- Percentage of time (total trip days) spent in Kent County =	35.62%
2- Percentage of total party trip expenditures spent in Kent Couny =	22.22%
3- Average expenditures per day per party during the whole trip =	$64.75
4- Average expenditures per day per party spent in Kent County =	$40.40

TABLE 3.2.6

REGION: ONTARIO

SUMMER SURVEY FROM JULY 8TH TO SEPTEMBER 5TH 1989

(NUMBER OF WEIGHTED PARTIES = 1701, 11.0%)

TOTAL TRIP DAYS	Sum =	17445 days
	Unweighted mean =	11.60 days
NEW BRUNSWICK TRIP DAYS	Mean =	4.75 days
KENT COUNTY TRIP DAYS	Sum =	4549 days
	Unweighted mean =	3.29 days
TOTAL PARTY TRIP EXPENDITURES	($) Sum =	$1,155,098.
	Unweighted mean =	$ 912.50
KENT COUNTY EXPENDITURES	($) Sum	$ 14,620.
	Unweighted mean =	$ 112.00.

RATIOS

1-	Percentage of time (total trip days) spent in Kent County =	26.07%
2-	Percentage of total party trip expenditures spent in Kent County =	12.66%
3-	Average expenditures per day per party during the whole trip =	$66.21
4-	Average expenditures per day per party spent in Kent County =	$32.14

TABLE 3.2.7

REGION: OTHER CANADA

SUMMER SURVEY FROM JULY 8TH TO SEPTEMBER 5TH 1989

(NUMBER OF WEIGHTED PARTIES = 248, 1.6%)

TOTAL TRIP DAYS	Sum =	1054 days
	Unweighted mean =	4.86 days
NEW BRUNSWICK TRIP DAYS	Mean =	9.83 days
KENT COUNTY TRIP DAYS	Sum =	434 days
	Unweighted mean =	2.33 days
TOTAL PARTY TRIP EXPENDITURES	($) Sum =	$113,212.
	Unweighted mean =	$ 608.67.
KENT COUNTY EXPENDITURES	($) Sum	$ 15,190.
	Unweighted mean =	$ 81.67.

RATIOS

1- Percentage of time (total trip days) spent in Kent County = 41.17%

2- Percentage of total party trip expenditures spent in Kent County = 13.42%

3- Average expenditures per day per party during the whole trip = $107.40

4- Average expenditures per day per party spent in Kent County = $35.00

TABLE 3.2.8

REGION: U.S.A

SUMMER SURVEY FROM JULY 8TH TO SEPTEMBER 5TH 1989

(NUMBER OF WEIGHTED PARTIES = 1265, 8.2%)

TOTAL TRIP DAYS	Sum =	12,270 days
	Unweighted mean =	10.39 days
NEW BRUNSWICK TRIP DAYS	Mean =	6.44 days
KENT COUNTY TRIP DAYS	Sum =	4427 days
	Unweighted mean =	4.04 days
TOTAL PARTY TRIP EXPENDITURES	($) Sum =	$358,881
	Unweighted mean =	$ 447.95
KENT COUNTY EXPENDITURES	($) Sum	$154,752.
	Unweighted mean =	$ 166.82.

RATIOS	
1- Percentage of time (total trip days) spent in Kent County =	36.08%
2- Percentage of total party trip expenditures spent in Kent County =	43.12%
3- Average expenditures per day per party during the whole trip =	$29.25
4- Average expenditures per day per party spent in Kent County =	$34.95

TABLE 3.2.9

REGION: FOREIGN

SUMMER SURVEY FROM JULY 8TH TO SEPTEMBER 5TH 1989

(NUMBER OF WEIGHTED PARTIES = 328, 2.1%)

TOTAL TRIP DAYS	Sum =	5029 days
	Unweighted mean =	15.33 days
NEW BRUNSWICK TRIP DAYS	Mean =	4.37 days
KENT COUNTY TRIP DAYS	Sum =	765 days
	Unweighted mean =	2.62 days
TOTAL PARTY TRIP EXPENDITURES	($) Sum =	$217,610.
	Unweighted mean =	$ 746.37
KENT COUNTY EXPENDITURES	($) Sum	$ 21,830.
	Unweighted mean =	$ 85.57.

RATIOS

1-	Percentage of time (total trip days) spent in Kent County =	15.22%
2-	Percentage of total party trip expenditures spent in Kent County =	10.03%
3-	Average expenditures per day per party during the whole trip =	$43.25
4-	Average expenditures per day per party spent Kent County =	$28.50

Figure 3.6 shows for each region their relative contributions (%) in terms of number of parties, number of days and expenditures spent in Kent county. As we can see in figure 3.6, each region presents a dominant contribution. A better visualization of this dominant contribution is possible with the mapping resulting from correspondence analysis. The graphical display (figure 3.7) indicates the emergence of three groups:

- Northumberland (NO), Quebec (QC) and Westmorland (WS) contributing mostly in terms of amount of expenditures ($$) spent in Kent County;

- USA (US) and other New Brunswick (NB) contributing mostly in terms of number of days (ti) spent in Kent County

- Atlantic (AT), Ontario (ON), Foreign (FO) and other Canada (OC) contributing mostly in terms of parties (vi) coming to Kent County.

Appendix B presents the detailed results of the economic impact for Kent County. The important results are:

- the average number of days spent in Kent County is 3.5 days (40% of total length of trip).

- the average expenditures in Kent County is $145.00, accounting for 20% of total trip expenditures ($685.00).

These results highlight a great interest for the Kent County but a smaller monetary impact. Indeed, parties spent relatively twice as much time than money in Kent county.

FIGURE 3.6

RELATIVE NUMBER OF PARTIES, DAYS AND DOLLARS SPENT IN KENT COUNTY BY PARTY VISITORS ORIGIN

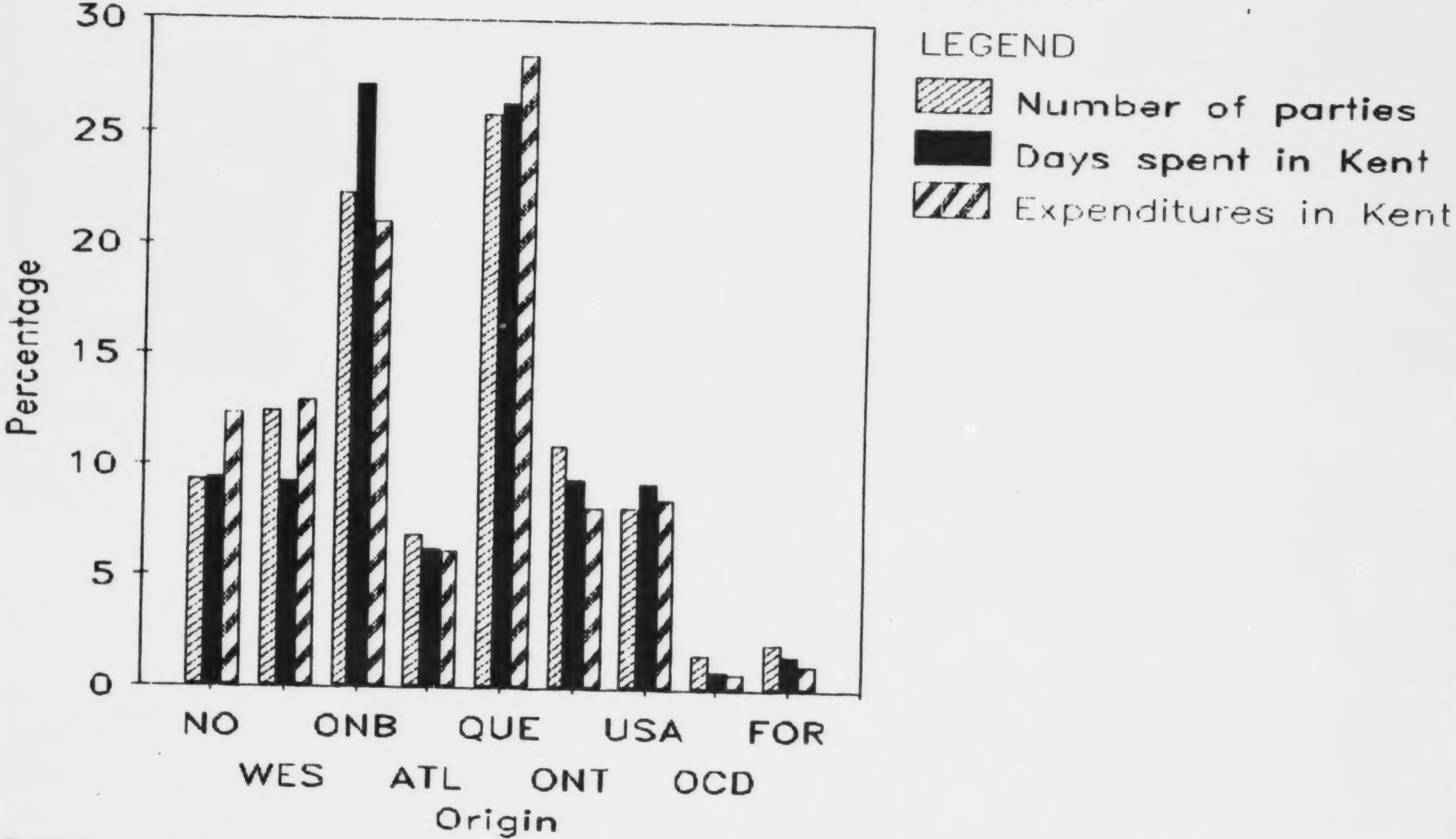
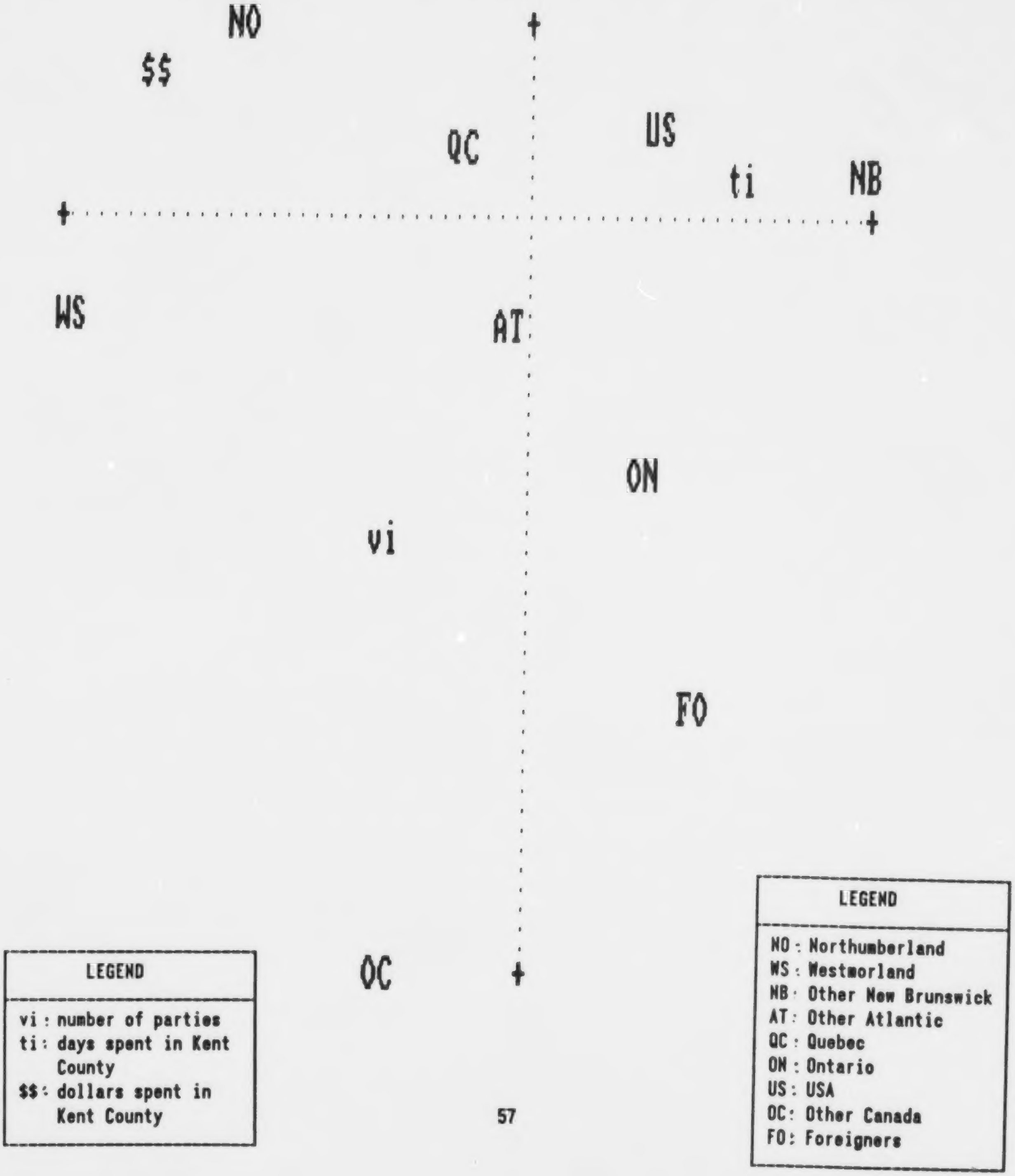


FIGURE 3.7

MAPPING OF RELATIVE NUMBER OF PARTIES DAYS AND DOLLARS SPENT IN KENT COUNTY BY PARTIES ORIGIN



3.3 Profile of summer parties by visit purpose

In order to extend the segmentation analysis, it is appropriate to consider another segmentation based on a grouping of parties according to the purpose of the visit.

Tables 3.3.1 to 3.3.6 present the profiles of the following sub-groups:

- Campers
- Beach Users
- Park Tourers
- Nature Appreciation parties
- Aquatic Recreation parties
- Interpretation parties

However, it is essential to note that unlike the segmentation by origin, these subgroups are not mutually exclusive. For example, a "Camper" can also be a "Beach user" and/or a "Park Tourer".

The Beach users account for 90% of the KNP summer market. As a consequence, they do not differ very much from the whole population of KNP visitors.

It is also clear as indicated in the results of tables 3.3.1 to 3.3.6 that many variables are not relevant to differentiate between the sub-groups. They are:

- Main reason of visit
- Programs participated in (dominant)

- Dominant evaluations of KNP
- Dominant party composition
- Average party size
- Source of information
- Improvements suggested.

Only the relative market size ranking is a distinguishing feature between the sub-groups. It is for this reason that origin is introduced in the profile of summer parties by visit purpose.

The campers segment is very different from other visitors. Indeed, most of them come from outside New Brunswick (59%) which explains the high percentage of first visit (52%). Most of the campers are aware of the park mandate (55%) and are very similar on this to the "Nature Appreciation parties"(56%).

Given the large size of the segment (76%), the Park Tourers have a profile similar to the general one. The party composition is the only distinctive variable because in addition to family and couple we can find groups of friends.

The Nature Appreciation parties represent half the parties population. As the campers, the nature appreciation parties, single or with friends, in similar proportions, are coming from New Brunswick and other regions. This confirms the interest for nature already mentioned for the Quebec and the U.S.A. parties.

The Aquatic Recreation parties represent the smallest segment (22%). The major distinction of these parties is that they come mostly from New Brunswick (66%), especially from Kent County 35%). The origins of the Aquatic recreation parties explain the high percentage of French speaking parties (70%) and repeat visit to the park (69%). These parties are similar to campers because the distinctive programs they participate in are evening programs and campfire.

The following tables present the detailed profile for each defined population.

TABLE 3.3.1

PROFILE OF CAMPERS

Size of market (number of parties)	5485
Percent of KNP market	25.6%
Market rank in number of parties (out of 6)	5th
Percent English speaking	48.2%
Main reasons for visit	.Camping, beach, sightseeing
Percent of first (repeat) visit	51.9% (48.1%)
Programs participated in:	
- dominant (in decreasing order)	.VRC, boardwalk exhibits, VRC exhibits
- distinctive (in decreasing order)	.Evening programs, campfire
Dominant evaluations of KNP	.Scenic-nature, peaceful-calm, nice park
Awareness of mandate	54.9%
Party composition	
- dominant (in decreasing order)	.Family with children, couple (90%)
- distinctive (in decreasing order)	.None
Average party size	3 persons
Source of trip information	.Friends and/or relatives, tourist bureau, tourist guide
Improvements suggested	.Campsite facilities, commercial activities, park publicity

Party origin =			
	Kent	8.6%	NB 41.3%
	Westmorland	6.3%	
	Northumberland	2.3%	
	Other New Brunswick	24.1%	
	Atlantic	7.1%	58.7%
	Quebec	31.3%	
	Ontario	10.7%	
	Other Canada	0.8%	
	USA	8.8%	

Average number of nights in campgrounds: 3.13 nights

TABLE 3.3.2

PROFILE OF BEACH USERS
(Beachwalk, sunbathing-swimming, picnicking)

Size of Market	19 669
Percent of KNP Market	91.8%
Market rank in number of parties (out of 6)	1st

Note:

Beach users represent more than 90% of KNP visitor parties. As a consequence, the profile of beach users is very similar to the following profile of the general park customer profile based on 21 426 parties:

Percent English speaking	45.47%
Main reasons for visit	.Beach, camping, sightseeing
Percent of first (repeat) visit	39.5% (60.5%))
Programs participated in:	
- dominant (in decreasing order)	.VRC, boardwalk exhibits, VRC exhibits
- distinctive (in decreasing order)	.Not applicable
Dominant evaluations of KNP	.Nice park, nature/scenic, peaceful/calm
Awareness of mandate	46.3%
Party composition	
- dominant (in decreasing order)	.Family with children, couple
- distinctive (in decreasing order)	.Not applicable
Average party size	3 persons
Source of trip information	.Friends and/or relatives, tourist bureau, tourist guide
Improvements suggested	.Campsite facilities, commercial activities, park publicity

Party origin =	Kent	26.6%	NB 60.5%
	Westmorland	8.7%	
	Northumberland	4.3%	
	Other New Brunswick	20.9%	
	Atlantic	5.0%	39.5%
	Quebec	19.8%	
	Ontario	7.7%	
	Other Canada	0.9%	
	USA	6.1%	

TABLE 3.3.3
PROFILE OF PARK TOURERS
(Sightseeing, hiking, bicycling)

Size of market (number of parties)	16376
Percent of KNP market	76.4%
Market rank in number of parties (out of 6)	2nd
Percent English speaking	45.1%
Main reasons for visit	.Beach, camping, sightseeing
Percent of first (repeat) visit	39.9% (60.1%)
Programs participated in:	
- dominant (in decreasing order)	.VRC, boardwalk exhibits, VRC exhibits
- distinctive (in decreasing order)	.None
Dominant evaluations of KNP	.Scenic-nature, peaceful-calm, nice park
Awareness of mandate	49.5%
Party composition	
- dominant (in decreasing order)	.Family with children, couple
- distinctive (in decreasing order)	.Group of friends
Average party size	3 persons
Source of trip information	.Friends and/or relatives, tourist bureau, tourist guide
Improvements suggested	.Campsite facilities, commercial activities, park publicity

Party origin =	Kent	23.3%	NB 57.8%
	Westmorland	9.9%	
	Northumberland	3.5%	
	Other New Brunswick	21.1%	
	Atlantic	5.5%	42.2%
	Quebec	22.5%	
	Ontario	7.0%	
	Other Canada	0.4%	
	USA	6.9%	

TABLE 3.3.4
PROFILE OF NATURE APPRECIATION PARTIES
(Nature study, birdwatching)

Size of market (number of parties)	10784
Percent of KNP market	50.3%
Market rank in number of parties (out of 6)	4th
Percent English speaking	43.0%
Main reasons for visit	.Camping, beach, sightseeing
Percent of first (repeat) visit	42.2% (57.8%)
Programs participated in:	
- dominant (in decreasing order)	.Boardwalk exhibits, VRC, VRC exhibits
- distinctive (in decreasing order)	.VRC Audio-visual show
Dominant evaluations of KNP	.Scenic-nature, peaceful-calm, nice park
Awareness of mandate	56.2%
Party composition	
- dominant (in decreasing order)	.Family with children, couple
- distinctive (in decreasing order)	.Alone, group of friends
Average party size	3 persons
Source of trip information	.Friends and/or relatives, tourist bureau, tourist guide
Improvements suggested	.Campsite facilities, commercial activities, park publicity

Party origin =	Kent	24.1%	NB
	Westmorland	8.4%	
	Northumberland	1.8%	52.0%
	Other New Brunswick	17.7%	
	Atlantic	4.8%	
	Quebec	26.6%	48.0%
	Ontario	9.0%	
	Other Canada	0.6%	
	USA	7.0%	

TABLE 3.3.5
PROFILE OF AQUATIC RECREATIONS PARTIES
(Fishing, boating, canoeing)

Size of market (number of parties)	4750
Percent of KNP market	22.2%
Market rank in number of parties (out of 6)	6th
Percent English speaking	29.5%
Main reasons for visit	.Beach, camping, sightseeing
Percent of first (repeat) visit	31.3 % (68.7%)
Programs participated in:	
- dominant (in decreasing order)	.VRC, boardwalk exhibits, family outing
- distinctive (in decreasing order)	.Evening programs, campfire, special event
Dominant evaluations of KNP	.Nice park, scenic-nature, peaceful calm
Awareness of mandate	47.0%
Party composition	
- dominant (in decreasing order)	.Family with children, couple
- distinctive (in decreasing order)	.Alone, group of friends
Average party size	3 persons
Source of trip information	.Friends and/or relatives, tourist bureau, tourist guide
Improvements suggested	.Campsite facilities, commercial activities, recreational activities

Party origin =	Kent	35.1%	NB
	Westmorland	8.0%	
	Northumberland	3.0%	66.2%
	Other New Brunswick	20.1%	
	Atlantic	5.1%	
	Quebec	17.7%	33.8%
	Ontario	4.7%	
	Other Canada	0.0%	
	USA	6.3%	

TABLE 3.3.6
PROFILE OF INTERPRETATION PROGRAMS PARTIES
(All programs excluding VRC and special events)

Size of market (number of parties)	15619
Percent of KNP market	72.9%
Market rank in number of parties (out of 6)	3rd
Percent English speaking	50.2%
Main reasons for visit	.Beach, camping, sightseeing
Percent of first (repeat) visit	42.7% (57.3%)
Programs participated in:	
- dominant (in decreasing order)	.Beachwalk, sightseeing, swimming-sunbathing
- distinctive (in decreasing order)	.Interpretation trails
Dominant evaluations of KNP	.Scenic-nature, peaceful-calm, nice park
Awareness of mandate	51.8%
Party composition	
- dominant (in decreasing order)	.Family with children, couple
- distinctive (in decreasing order)	.More than one family, group of friends
Average party size	3.2 persons
Source of trip information	.Friends and/or relatives, tourist bureau, tourist guide
Improvements suggested	.Campsite facilities, commercial activities, park publicity

Party origin =	Kent	20.5%	NB
	Westmorland	8.3%	
	Northumberland	4.3%	53.9%
	Other New Brunswick	20.8%	
	Atlantic	5.6%	
	Quebec	24.2%	46.1%
	Ontario	8.6%	
	Other Canada	0.8%	
	USA	6.9%	

3.4. Profile of winter visitors

Most winter visitors are skiers and come from Kent County:

- 80% come from Kent
- 77% come to ski

In view of these statistics, it was necessary to subdivide each of these groups.
Kent = Kent 1 - Kent 2 - Other Kent.
Skiers = frequent (more than 5 times per month)
= not frequent (1 to 5 times per month)

For the purpose of geographical segmentation of park visitors, certain groupings within variables were necessary. Previous results, as regards frequencies, showed 18 different geographical origin. The suggested segmentation basis (Kent, Westmorland, other New Brunswick, other markets) was not balanced enough because the Kent region accounted for 79% of the total day time visitors. In order to get a better knowledge of park visitors, the County of Kent was divided into three areas according to their proximity with the park entrance. The following table indicates the three subdivisions of the County of Kent.

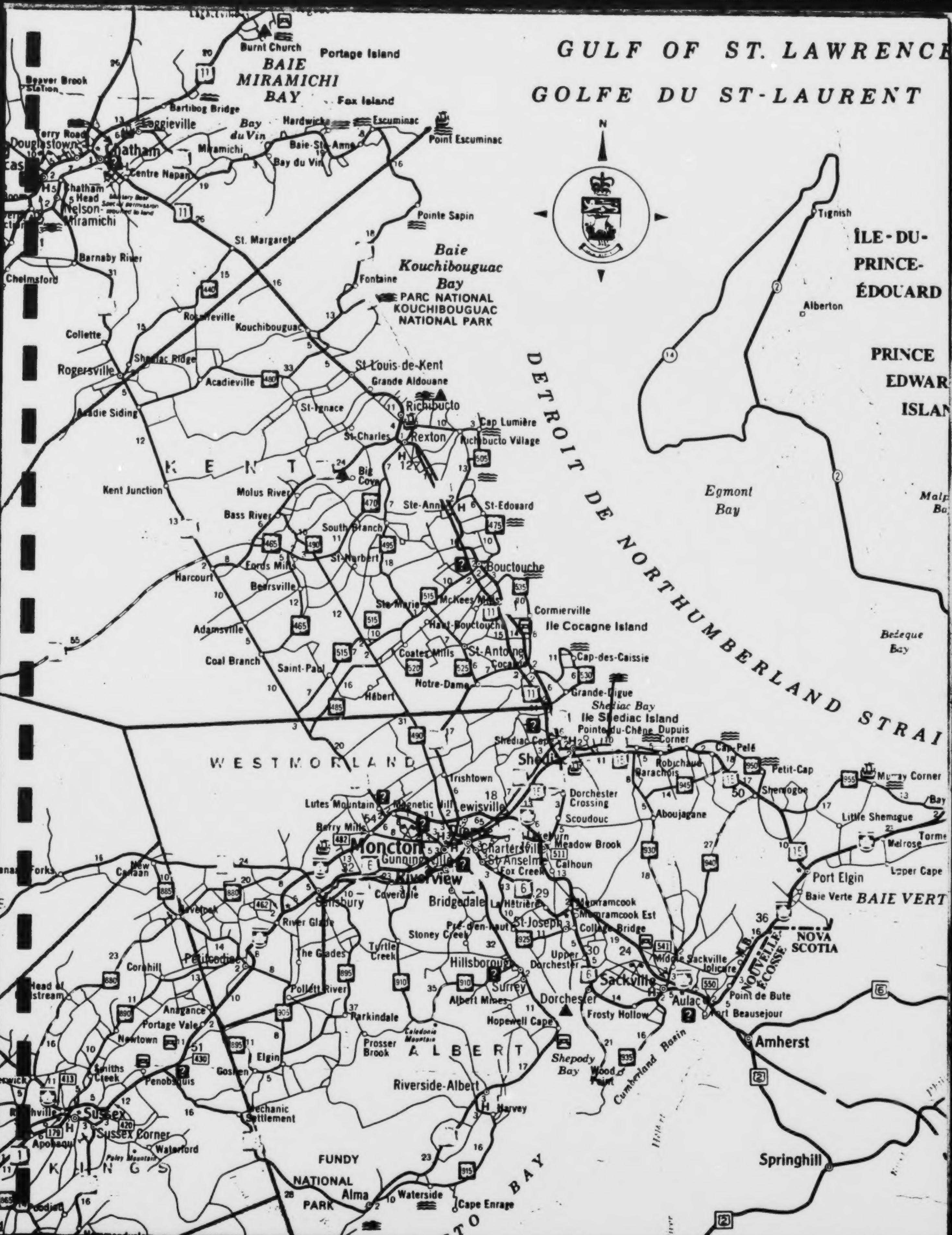
DISTANCES BETWEEN TOWNS IN THE COUNTY OF KENT AND THE PARK ENTRANCE

DISTANCES TOWNS *	UNDER 10KM KENT 1	10 TO 25KM KENT 2	MORE THAN 25KM OTHER KENT
Kouchibouguac	X		
St Louis de Kent	X		
Richiboucto		X	
Rexton		X	
Pointe Sapin		X	
Buctouche			X
St. Antoine			X
Other Kent			X

* See location of towns on the map enclosed.

Since 98.6% of the day time visitors came from New Brunswick, it was decided to drop the other markets from the analysis.

According to the suggested geographical segmentation, New Brunswick visitors (except those from Kent county) were subdivided into Westmorland county on the one hand and other counties of New Brunswick on the other.


GULF OF ST. LAWRENCE
GOLFE DU ST-LAURENT
N
BAIE MIRAMICHI BAY
Burnt Church
Portage Island
Fox Island
Beaver Brook Station
Bartibog Bridge
Loggieville
Bay du Vin
Hardwicke
Escuminac
Point Escuminac
Baie-Ste-Anne
Bay du Vin
Douglastown
Chatham
Miramichi
Centre Napan
Chatham Head
Nelson-Miramichi
Terry Road
Barnaby River
Chelmsford
St. Margarets
Pointe Sapin
Baie Kouchibouguac Bay
Fontaine
PARC NATIONAL KOUCHIBOUGUAC NATIONAL PARK
Rosaireville
Collette
Kouchibouguac
Rogersville
Shediac Ridge
Acadieville
St-Louis-de-Kent
Grande Aldouane
Acadie Siding
St-Ignace
Richibucto
St-Charles
Rexton
Cap Lumière
Richibucto Village
DETROIT DE NORTHUMBERLAND STRAIT
K E N T
Big Cove
Kent Junction
Molus River
Ste-Anne
St-Edouard
Bass River
South Branch
St-Norbert
Fords Mills
Harcourt
Bouctouche
Beersville
Ste-Marie
McKees Mills
Cormierville
Ile Cocagne Island
Adamsville
Haut-Bouctouche
Coal Branch
Coates Mills
St-Antoine
Cocagne
Cap-des-Caissie
Saint-Paul
Notre-Dame
Hébert
Grande-Digue
Shediac Bay
Ile Shediac Island
Pointe-du-Chêne
Dupuis Corner
Shediac Cape
Shediac
Cap-Pelé
Petit-Cap
Robichaud
Barachois
Murray Corner
W E S T M O R L A N D
Irishtown
Dorchester Crossing
Scoudouc
Aboujagane
Shemogue
Little Shemogue
Lutes Mountain
Magnetic Hill
Lewisville
Berry Mills
Moncton
Dieppe
Chartersville
St-Anselme
Meadow Brook
Calhoun
Fox Creek
Melrose
Upper Cape
Port Elgin
Baie Verte
BAIE VERTE
New Canaan
Canaan Forks
Gunningsville
Riverview
Salisbury
Coverdale
Bridgedale
La Hétrière
Memramcook
Memramcook Est
College Bridge
St-Joseph
Pré-d'en-Haut
Havelock
River Glade
The Glades
Turtle Creek
Stoney Creek
NOVA SCOTIA
NOUVELLE-ÉCOSSE
Middle Sackville
Jolicure
Petitcodiac
Cornhill
Head of Millstream
Hillsborough
Upper Dorchester
Sackville
Aulac
Point de Bute
Fort Beausejour
Pollett River
Surrey
Albert Mines
Dorchester
Frosty Hollow
Anagance
Portage Vale
Parkindale
Hopewell Cape
Amherst
Newtown
Prosser Brook
Caledonia Mountain
A L B E R T
Shepody Bay
Wood Point
Cumberland Basin
Elgin
Goshen
Penobsquis
Smiths Creek
Berwick
Riverside-Albert
Harvey
Sussex
Sussex Corner
Apohaqui
Waterford
Mechanic Settlement
K I N G S
FUNDY NATIONAL PARK
Alma
Waterside
Cape Enrage
Springhill
CHIGNECTO BAY
Tignish
ÎLE-DU-PRINCE-ÉDOUARD
Alberton
PRINCE EDWARD ISLAND
Egmont Bay
Bedeque Bay
Malpeque Bay

DESCRIPTION OF THE TWO AREAS

(WESTMORLAND, OTHER NEW BRUNSWICK)

WESTMORLAND	OTHER NEW BRUNSWICK
. Moncton . Shediac	. Chatham (Northumberland County) . Newcastle (Northumberland County) . Bathurst (Gloucester County) . Other New Brunswick

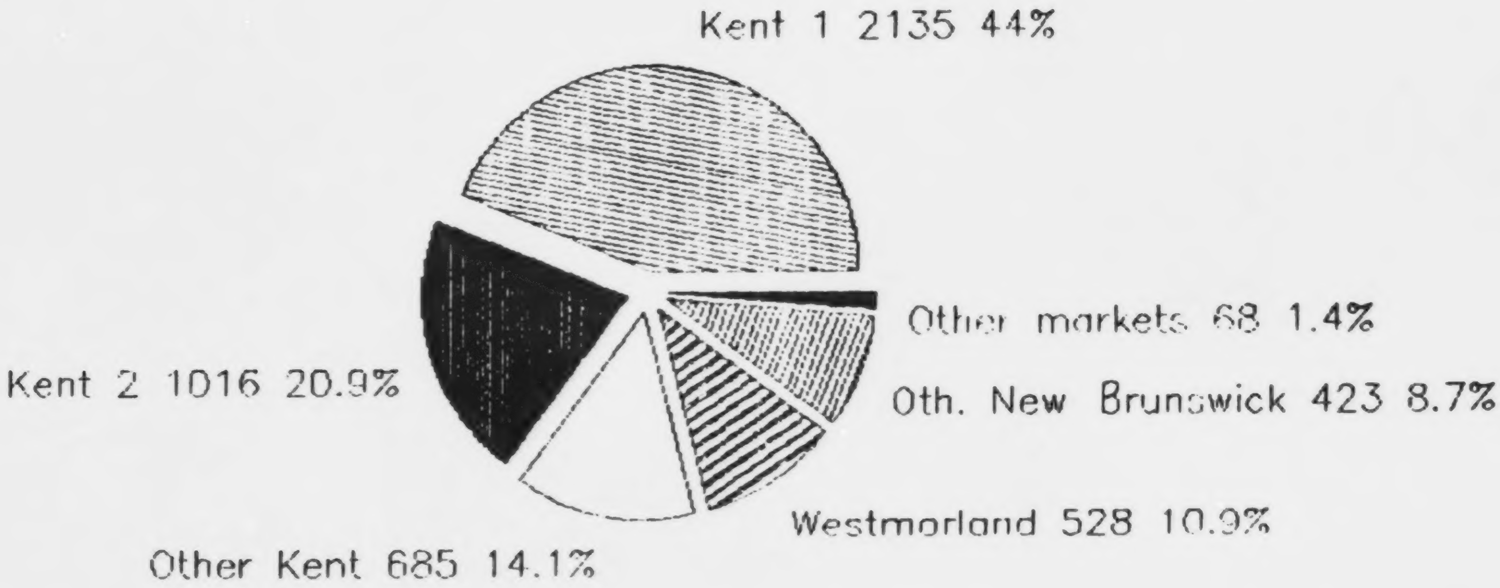
The relative size of day time visitors according to this new subdivision is indicated in the following table and in the following pie shaped diagram.

RELATIVE SIZE OF DAT TIME VISITORS (N= 4856)

AS A FUNCTION OF ORIGIN

	NUMBER OF VISITORS (WEIGHTED)	%
Kent 1	2135	44.0%
Kent 2	1016	20.9%
Other Kent	685	14.1%
Westmorland	528	10.9%
Other New Brunswick	423	8.7%
		98.6%
Omitted	68	1.4%
TOTAL	4856	100.0%

ORIGIN OF WINTER DAY-TIME VISITORS



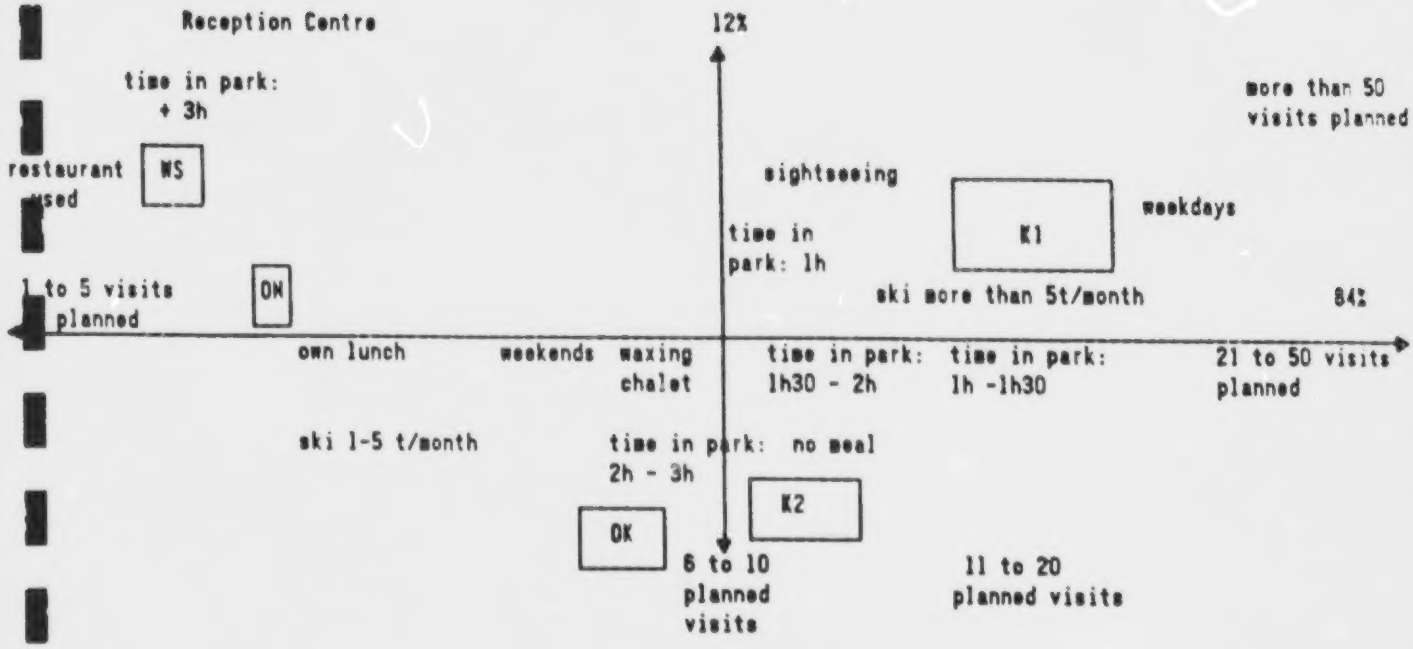
The subdivision of Kent revealed itself important because visitors' attitudes differ as they belong to K1, K2, or other Kent.

K1 (people living near the park) visitors stay a short time in the park, come alone and on weekdays (see figure 3.8 and 3.9. They also come frequently. K2 and Other Kent visitors stay longer (2-3 hours) but come less frequently (figure 5). These visitors come as well during the week as weekends. They also come accompanied by friends or family (figure 3.9).

Even if the three subgroups are all coming to the Park mainly for skiing, we see that people living near the Park (K1) are more frequent skiers (figure 3.8).

FIGURE 3.8

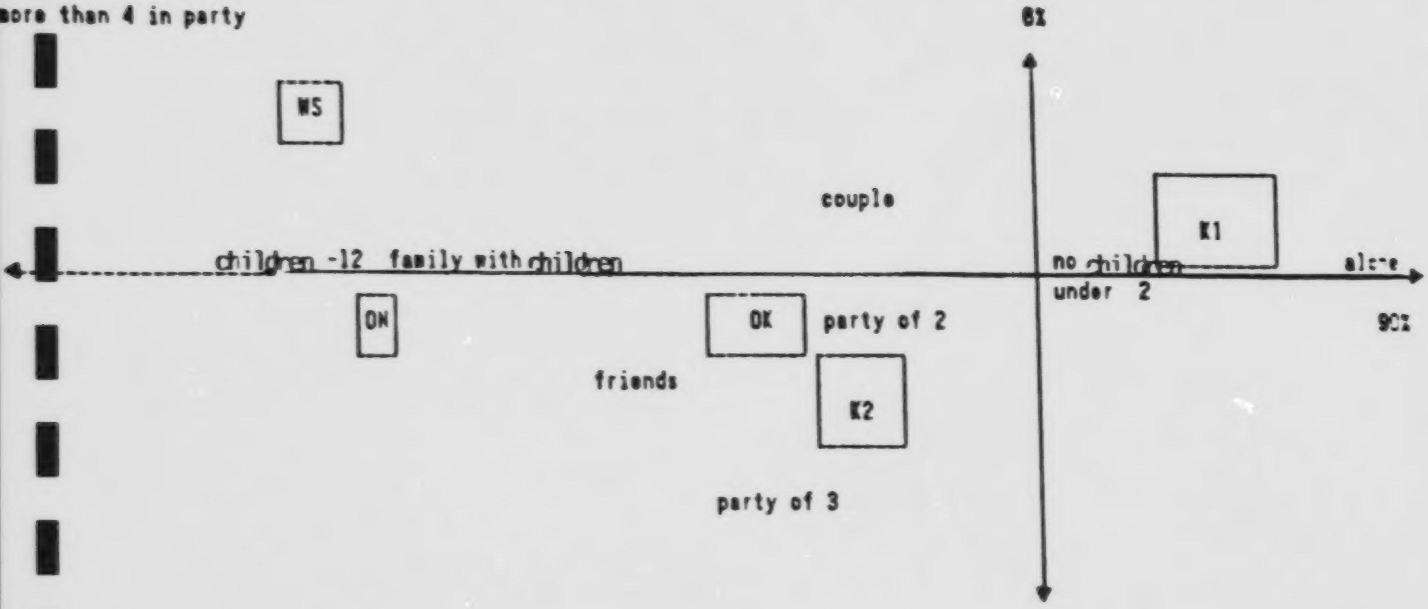
MAPPING OF PARTY VISITORS ACCORDING TO ORIGIN
RELATION TO ACTIVITIES AND SERVICES USED



LEGEND	
	% of party visitors
K1: Centre Kent	44%
K2: Middle Kent	20.9%
OK: Other Kent	14%
WS: Westmorland	11%
ON: Other New Brunswick	9%

FIGURE 3.9

MAPPING OF WINTER PARTY VISITORS ACCORDING TO ORIGIN IN RELATION TO GROUP COMPOSITION



LEGEND	% of party visitors
K1: Centre Kent	44%
K2: Middle Kent	20.9%
OK: Other Kent	14%
WS: Westmorland	11%
ON: Other New Brunswick	9%

If we look at the winter market profile by origin (Kent, Westmorland, Other N.B.) presented in table 3.4.1, we see:

- Kent visitors are coming as well during the week as on weekends (80% of the others come on weekends).
- Kent visitors come more often but for shorter stays.
- Four out of five times, visitors come to ski, whatever of their origin.
- Demographically speaking, each segment has its particularities.
  - . Kent visitors come mostly alone, sometimes in couples.
  - . Westmorland visitors come mostly in couples, sometimes with family members.
  - . Other New Brunswickers are coming with family members or friends. This segment accounts for the highest number of children under 12 years old.

As we can see, visitors are different as their origin differs. However we can not forget that the Park's winter market is mainly in Kent county and in that county there are different behavior that have to be taken into account for elaborating future marketing strategies.

TABLE 3.4.1
PROFILE OF WINTER VISITORS

	KENT COUNTY	WESTMORLAND	OTHER NEW BRUNSWICK
Size of market (number of visitors):	3836	528	423
Percent of KNP market:	80%	11%	9%
Market rank	1st	2nd	3rd
Activities			
.Skiing (1-5 times/month)	28%	63%	62%
.Skiing (+5 times/month)	49%	22%	24%
.Sightseeing	23%	15%	14%
Services			
.Reception Centre	4%	13%	15%
.Waxing chalet	32%	26%	23%
.Restaurant	1%	5%	3%
.Own lunch brought	25%	42%	37%
.No lunch	38%	14%	22%
Time			
.Weekdays	43%	19%	14%
.Weekends	57%	81%	86%
Time spent in the park			
.Less than 1h.	16%	8%	11%
.1h. - 1h.30	31%	7%	18%
.1h.30 - 2h.	25%	21%	19%
.2h. - 3h.	20%	16%	26%
.More than 3h.	8%	48%	26%

TABLE 3.4.1.

PROFILE OF WINTER VISITORS (CONTINUED)

	KENT COUNTY	WESTMORLAND	OTHER NEW BRUNSWICK
Number of visits planned			
.1 to 5 for the winter	12%	59%	51%
.6 to 10 for the winter	18%	14%	34%
.11 to 20 for the winter	23%	27%	7%
.21 to 50 for the winter	25%	0%	7%
.More than 50	23%	0%	0%
Party composition			
.Family with children	15%	28%	30%
.Group of friends	19%	23%	28%
.Alone	39%	9%	16%
.Couple	28%	40%	26%
Number in party			
.1 person	39%	9%	16%
.2 persons	43%	52%	42%
.3 persons	11%	8%	20%
.4 persons and more	7%	31%	22%
Children under 12 years old			
.None	87%	73%	69%
.One or more	13%	27%	31%
Time of visit (N=760) (Unweighted numbers)			
.Weekdays	40%	15%	10%
.Weekends	42%	78%	76%
.Evening	18%	6%	13%

3.5 Overview of distinctive features of current summer and winter market segments

A summary of geographical market segmentation incorporating the a priori and the a posteriori approaches is presented in the following diagrams. The dominant and similar features of each segment are not listed because distinctive features are more helpful for specific marketing approaches. The first diagram presents the relative size of the summer and the winter market for Kouchibouguac National Park. The summer market is about 64% of the total. The winter market accounts for 13% of the total and can be subdivided into two approximately equal segments. The smaller winter market is however subdivided into three subsegments of unequal size with visitors from Centre Kent being roughly twice the number of visitors from Westmorland and other New Brunswick.

Details about the summer market are summarized in a separate diagram indicating distinctive activities, programs and party composition more likely to be associated with each of the two market segments. Visitors from Westmorland are not consistently associated with the second market segment and may be treated as a marginal entity (accounting for 8.7% of the total summer market).

The winter market structure is also presented in a separate diagram with distinctive activities, frequencies of visit and party composition more likely to be associated with each of the three market segments. This market is five times smaller than the summer market and winter visitors are drawn from much closer areas than summer visitors.

KOUCHIBOUGUAC NATIONAL PARK

GEOGRAPHICAL MARKET SEGMENTATION

SUMMER MARKET
64%
1. Parties from Kent, Northumberland and other New Brunswick (51.8%)
2. Parties from Quebec, Ontario, U.S.A. (Westmorland) and Atlantic (except New Brunswick) (48.2%)

WINTER MARKET
13%
1. Parties from Centre Kent (44%)
2. Parties from Middle Kent and other Kent (34.9%)
3. Parties from Westmorland and other New Brunswick (20%)

SUMMER MARKET SEGMENTS
DISTINCTIVE CHARACTERISTICS
64%

1. Parties from Kent, Northumberland and other New Brunswick (51.8%)

. Prefer fun, personal well being and more sportive activities

- beachwalk
- swimming-sunbathing (beaches)
- picnicking
- canoeing
- boating

. Prefer fun and family programs

- family outing
- special event
- campfires
- puppet show
- restaurant
- canteen

. Party composition

- group of friends
- family with children

2. Parties from Quebec, Ontario, U.S.A. (Westmorland) and Atlantic (except New Brunswick) (48.2%)

. Prefer nature, scenic and less sportive activities

- nature study
- birdwatching
- interpretation trails
- hicking
- sightseeing

. Prefer educational programs
- boardwalk to exhibits (trails)
- Visitor Reception Centre (audio-visuals and exhibits)
- evening programs

. Party composition
- couples

WINTER MARKET SEGMENTS
DISTINCTIVE CHARACTERISTICS
13%

1. Parties from Centre Kent (44%)

- Weekday visit of 1h30 at most
- Sightseeing and frequent cross-country skiers more than 5t/month
- Plan to come 20 times or more
- Tend to be alone
- Without children under 12

2. Parties from Middle Kent and other Kent (34.9%)

- Weekend visit for 1h30 to 3h.
- Use waxing chalet
- Plan to come 11 to 20 times (Middle Kent) of 6 to 10 times (other Kent)
- Couples or friends of 2 to 4 visitors
- Without children under 12

3. Parties from Westmorland and other New Brunswick (20%)

- Less frequent cross-country skiers
- Spend more than 3h in the park
- Use restaurant (Westmorland) or bring lunch (other N.B.)
- Plan to come 1 to 5 times
- Families with kids
- Groups of 4 or more

SEGMENTATION PROFILING AND ANALYSIS OF MARKET AREAS II, III AND IV (CURRENT AND POTENTIAL CAPTURE

CHAPTER 4

4.0 SEGMENTATION PROFILING AND ANALYSIS OF MARKET AREAS II, III AND IV (CURRENT AND POTENTIAL CAPTURE)

The profiles of market areas II, III and IV are based on secondary data sources of various quality and obsolescence.

First, the New Brunswick Auto Exit Survey gives a picture of:

-Tourists and excursionists passing through point 29 on highway 11 (market area II)

-Non New Brunswick Resident Tourists and Excursionists coming to Kent County (market area III).

Second, the New Brunswick Travel Data 1984 give some information on person-trips completed by New Brunswickers travelling within New-Brunswick (market area IV).

Third, data from Touriscope 1986 Domestic Travel (Canadian travelling in Canada) indicates some global travel trends with respect to New Brunswick as a destination as regards the origin and expenditures of travellers.

Fourth, the Financial Post Survey of Canadian Markets, 1986 allows us to compile figures and trends on population, households, disposable income and retail sales broken down according to the origins of our present profiles of summer parties at Kouchibouguac National Park.

Fifth, population figures and demographic trends from Statistics Canada and other documents from Tourism Canada and Tourism USA refering to global trends and interests of future travellers.

As regards quality, the Auto Exit Survey figures are not very reliable, some inconsistencies and some computation errors in percentages indicate that the data should be examined with caution. Since the survey was conducted in 1983, totals may be almost useless, but percentages may be indicative of some characteristics of parties and trips by non resident tourists and excursionists. Data from the new survey planned in 1989 should be very valuable to get a better evaluation of potential demand.

In spite of its lower quality, the Auto Exit Survey is however much more specific in relation to Kouchibouguac potential demand than more reliable and global data sources such as the Financial Post Survey of Markets and Statistics Canada.

4.1 Profile of Highway 11 Tourists and Excursionist (market area II)

Table 4.1.1 summarizes the profile of tourists and excursionists parties passing through Kouchibouguac point 29 on highway 11. Data from other passing points in the same area such as Richibouctou or Rexton are very similar. The total number of parties passing through may be obsolete (data are from the New Brunswick Survey of 1983) but the characteristics of parties and characteristics of the travel in percentages may be still valid for comparison with the present capture of visitors at Kouchibouguac National Park (KNP).

With respect to origin, Quebec (36.2%) Ontario (25%) U.S.A. (19.8%) and Atlantic (12.6%) are respectively 1st, 2nd, 3rd and 4th. The 1988 Summer visitor survey, with parties from New Brunswick excluded, gives the following origin of parties:

Quebec (50%), Ontario (19.52%), U.S.A. (15.38%), Atlantic (12.75%) and other Canada (2.28%). Therefore if 1983 percentages are still valid, it appears that the capture of Quebec parties by KNP is very good (50% vs 36.2%) however Ontario visitors seem less attracted (19.52% vs 25%). Atlantic Canada is on par with 12.6% of KNP parties and 12.75% passing through.

The percentage of first time visitor (35%) if still valid, is lower than (42.3%) the percentage of parties visiting KNP for the first time according to the traffic partition survey of 1988.

As regards characteristics of the travel, 38% have used camping accommodation, which is roughly similar to the percentage of campers (39.1%) among KNP party visitors. Hence KNP seems to get its fair share of campers among parties passing through highway 11.

Looking at activities of interest for Tourists and Excursionists, fishing (47.5%) appears much higher than the percentage of 3.9% party visitors participating in fishing at KNP from the 1988 Summer visitor survey. Other activities such as beach-swimming, hiking and canoeing are roughly in line with percentages from the 1988 visitor survey.

Table 4.1.2 indicates figures for New Brunswick Non Resident Tourists and Excursionists coming to Kent county. The pattern of origin is somewhat similar to parties passing through highway 11. However, all people outside Kent county are accounted for and if 1983 percentages are still valid they compare as follows with figures from the 1988 Summer visitor survey.

ORIGIN OF PARTIES	PERCENTAGES OF KENT COUNTY PARTY VISITORS (1983)	PERCENTAGES OF KNP PARTIES (KENT EXCLUDED (1988)	DIFFERERENCE
Quebec	34.8%	27.0%	-7.8
Other New Brunswick	20.5%	28.6%	+8.1
Ontario	14.6%	10.5%	-4.1
U.S.A.	11.8%	8.3%	-3.5
Atlantic	10.6%	6.9%	-3.7
Westmorland	4.1%	12.0%	+7.9
Other Canada	2.4%	1.2%	-0.8
Northumberland	1.2%	5.8%	+4.6

KNP capture of parties coming to Kent county appears quite good as regards Other New Brunswick (+8.1), Westmorland (+7.9) and Northumberland (+4.6) however, Quebec capture (-7.8) does not look as good as with parties passing through (table 4.1.1). Capture of Ontario parties is still difficult (-4.1) and KNP does not seem to attract its fair share of Atlantic and U.S.A. parties visiting Kent county (-3.7 and - 3.5).

With respect to the percentage of first time visitor in Kent county (27%) it is lower than the percentage of first time visitor passing through highway 11 (35%) and lower than the percentage of party visiting KNP for the first time according to the traffic partition survey of 1988. Hence the degree of newness to the area, if 1983 figures are still valid , seem to be lower for Kent county visitors then for passing through parties.

This trend is confirmed by the percentage of parties to ever visit KNP (57.5%) for Kent county visitors as compared with (32.7%) for passing through parties. This would tend to indicate that passing through parties are less aware of KNP and that their capture may require additional communication effort as compared to parties coming to Kent county.

As regards characteristics of the travel (in table 4.1.2), 49% have used camping accomodation which is higher than 38% for passing through parties (in table 4.1.1). Hence Kent county visitors seem to be a better potential market for campers.

Looking at activities interested in, fishing is still much higher than the percentage of party visitors participating in fishing at KNP from the 1988 summer visitor survey. Other activities such as beach, swimming hiking and canoeing are similar to passing through parties and roughly in line with percentage from the 1988 visitor survey.

Table 4.1.3 presents a break down of parties according to first time to Kent county and "first/ not first" visit to KNP. Data used for the breakdown are from the New Brunswick Exit Survey of 1983 and the Economic Impact Survey (excluding Kent residents) of 1988. Results should be examined with caution since 1983 figures may no longer be valid.

Twenty seven per cent (27%) of the visitors to Kent county are coming for the first time and 49% (or 42.5% according to the New Brunswick Exit Survey 1983) have never visited KNP. Among those not coming to Kent county for the first time, 25.5% are first visitors to the park and 25.5% are repeat visitors to the park.

TABLE 4.1.1

MARKET AREA II

TOURISTS AND EXCURSIONIST PARTIES

PASSING THROUGH KOUCHIGOUBUAC POINT # 29

(NEW BRUNSWICK EXIT SURVEY 1983)*

<table>
<tr><td colspan="2">NUMBER OF TOURISTS AND EXCURSIONISTS
PARTIES
MAY 16TH TO OCTOBER 31ST 1983
N= 90 918</td></tr>
<tr><td>CHARACTERISTICS OF PARTIES</td><td>CHARACTERISTICS OF THE TRAVEL</td></tr>
<tr><td>Kind of parties:
87% tourists
13% excursionists

Number in party:
mean= 2.55

Origin: Quebec: 36.2%
Ontario: 25.0%
U.S.A.: 19.8%
Atlantic: 12.5%
Other Canada: 6.2%

First time visitors: 35%</td><td>Type of accomodation:
Camping 38%
Friends/relatives 28%
Hotel/Motel 20%
Hotel 7%
Rented cabin 5%

% of parties to ever visit
Kouchibouguac 32.7%
Parlee Beach 28.4%
Magnetic Hill 49.2%

Activities interested in
Beach swimming 68.5%
Hiking 47.8%
Fishing 47.5%
Canoeing 29.7%</td></tr>
</table>

* An auto exit survey consists of randomly selecting a sample from non-resident automobile parties exiting the Province at various points.

TABLE 4.1.2

MARKET AREA II

NEW BRUNSWICK NON RESIDENT
TOURISTS AND EXCURSIONISTS
COMING TO KENT COUNTY

(PROFILE FROM 1983 NEW BRUNSWICK
EXIT SURVEY, REGION: KENT COUNTY)

NUMBER OF TOURISTS AND EXCURSIONISTS
PARTIES
MAY 16TH TO OCTOBER 31ST 1983

N= 25 709

CHARACTERISTICS OF PARTIES

Number in party: mean 2.66 persons

Origin:		Income per capita (1986)
Québec:	34.8%	$12,000.
Other NB:	20.5%	9,900.
Ontario:	14.6%	13,900.
U.S.A.:	11.8%	NA
Atlantic:	10.6%	NA
Westmorland:	4.1%	10,700.
Other Canada:	2.4%	12,700.
Northumberland:	1.2%	7,900.

Percentage change of overnight travels 1980-1986

Québec	-5.6%
NB	-3.4%
Ontario	+5.8%

French (English) speaking: 32.2% (67.8%)

First time visitors: 27%

CHARACTERISTICS OF THE TRAVEL

Type of accomodation:

Camping	49%
Friends/relative	20%
Hotel/Motel	15%
Rented cabin	8%

Main expenses:

Food and restaurants	36%
Transportation	27%
Accommodations	19%
Entertainament	3%

% of parties to ever visit

Kouchibouguac	57.5%
Parlee Beach	28.1%
Magnetic Hill	56.1%

Activities interested in

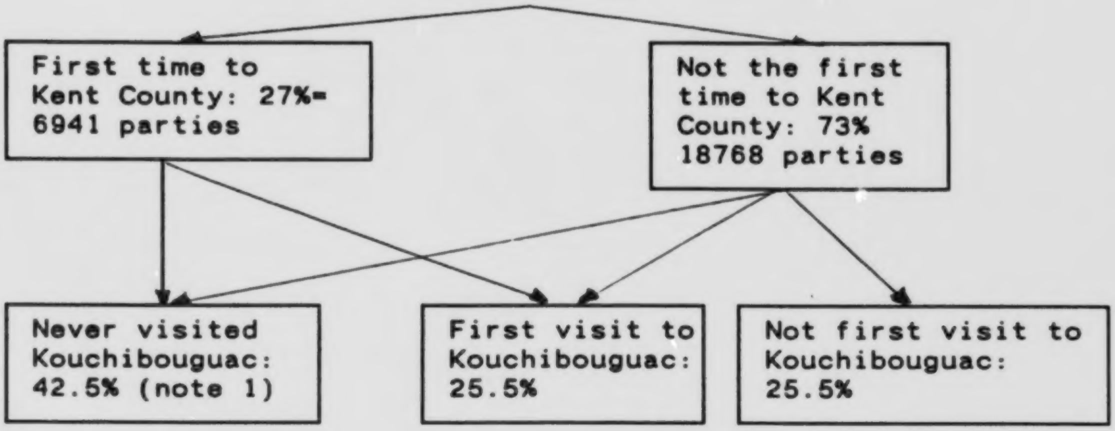
Beach swimming	68.9%
Hiking	54.2%
Fishing	45.6%
Canoeing	36.4%

TABLE 4.1.3

MARKET AREA II
TOURISTS WHO STAYED OVERNIGHT IN KENT COUNTY NEW BRUNSWICK EXIT SURVEY 1983 AND ECONOMIC IMPACT SURVEY KOUCHIBOUGUAC NATIONAL PARK 1988

NUMBER OF TOURIST AND EXCURSIONIST PARTIES

N= 25 709


First time to Kent County: 27%= 6941 parties
Not the first time to Kent County: 73% 18768 parties
Never visited Kouchibouguac: 42.5% (note 1)
First visit to Kouchibouguac: 25.5%
Not first visit to Kouchibouguac: 25.5%

Note 1:

According to the New Brunswick Exit Survey, 1983, tourists who stayed overnight in Kent county never visited Kouchibouguac 42.5% of the time (100 - 57.5%) and may have been attracted by:

Magnetic Hill	56%
Hopewell Rocks	34%
Parlee Beach	28%

4.2 Profile of New Brunswick Non Resident Tourists and Excursionists (market area III)

Table 4.2.1 indicates characteristics of parties and characteristics of travel for market area III from the 1983 New Brunswick Exit Survey. The pattern of party characteristics is different from market area II (tables 4.1.1 and 4.1.2). Party size (2.4) is slightly lower than for market area II (2.55 and 2.66), and U.S.A. and Atlantic are the dominant origins for market area III as compared with Quebec, Other New Brunswick and Ontario in market area II.

Data from Touriscope 1986 Domestic Travel indicate that 44% of trips to New Brunswick are acounted for by non-residents (as compared to an average of 20% for Canada as a whole). Seventy four percent of travel expenses in New Brunswick come from non residents. Therefore non-residents do represent a substantial market not only in number of parties but especially in tourism revenue. Among non-residents, Atlantic parties are particularly interesting since they have a high propensity to travel 43% of the time outside their province for 70% of their travel expenses.

With respect to the characteristics of the travel, camping is less popular (18%) than for market area II (38% and 49%). The percentage of parties to ever visit KNP is much lower (12.4%) than for market area II (32.7% and 57.5%) indicating additional need to increase awareness level in market area III. As regards activities interested in, fishing is quite high (44.5%) and comparable to market area II (47.5% and 45.6%) indicating a need that KNP is not meeting since only 3.9% party visitors participated in fishing according to the 1988 summer visitor survey.

TABLE 4.2.1
MARKET AREA III
NEW BRUNSWICK NON RESIDENT TOURISTS AND EXCURSIONISTS
(PROFILE FROM 1983 NEW BRUNSWICK EXIT SURVEY)

MAY 16TH TO OCTOBER 31ST 1983

NUMBER OF TOURISTS AND EXCURSIONISTS
PARTIES
N= 1096062

CHARACTERISTICS OF PARTIES

Kind of parties:

48% tourists
52% excursionists

Number in party:

mean= 2.4 persons

Origin:		
U.S.A.:	38.5%	
Atlantic:	22.5%	(1)
Quebec:	20.6%	(2)
Ontario:	15.3%	(3)
Other Canada:	3.1%	

Note: (1) Usually they travel outside their province 43% of the time for 70% of their travel expenses
(2) Usually they travel outside their province 16% of the time for 35% of their travel expenses
(3) Usually they travel outside their province 13% of the time for 45% of their travel expenses

French (English) speaking: 19.4% (79.5%)
First time visitors: 18.6%

CHARACTERISTICS OF THE TRAVEL

Type of accommodation

45% by friends, parents
19% at a motel
18% use camping
7% cabin owned cottage

Main expenses:

39% Food and restaurant
28% transportation
16% accomodation
4% entertainment

% of parties to ever visit

.Kouchibouguac:	12.4%
.Parlee Beach:	20.0%
.Magnetic Hill	49.0%

Activities interested in

Beach swimming	59.4%
Fishing	44.5%
Hiking	31.4%

TABLE 4.2.1

MARKET AREA III

(CONTINUED)

NOTE:

Data from Touriscope 1986, Domestic Travel (Canadians Tavelling in Canada) indicates that as a destination New Brunswick witnessed a great percentage increase during 1984-1986 period. Total person-trips were 2,365,000 in 1984 and 3,019,000 in 1986 for a percentage change of 27.7%.

As a destination 44% of trips to New Brunswick are accounted for by non-residents (as compared to an average of 20% for Canada as a whole). Seventy four percent of travel expenses in New Brunswick come from non residents (as compared to an average of 49% for Canada as a whole).

Figure 4.2.2 is the result of a study of the US Travel Market performed by Tourism Canada. Since U.S.A. is the most important origin for market area III, the Canadian outdoors destination as perceived by the American tourist market is valuable for marketing purposes oriented towards the US market. Features on the right upper hand corner of the figure are important and favoring Canada. They are: real adventure, hunting/fishing, reclusion/-privacy, different life style and with slightly less importance natural/untouched.

4.3 Profile of New Brunswick resident trips (market area IV)

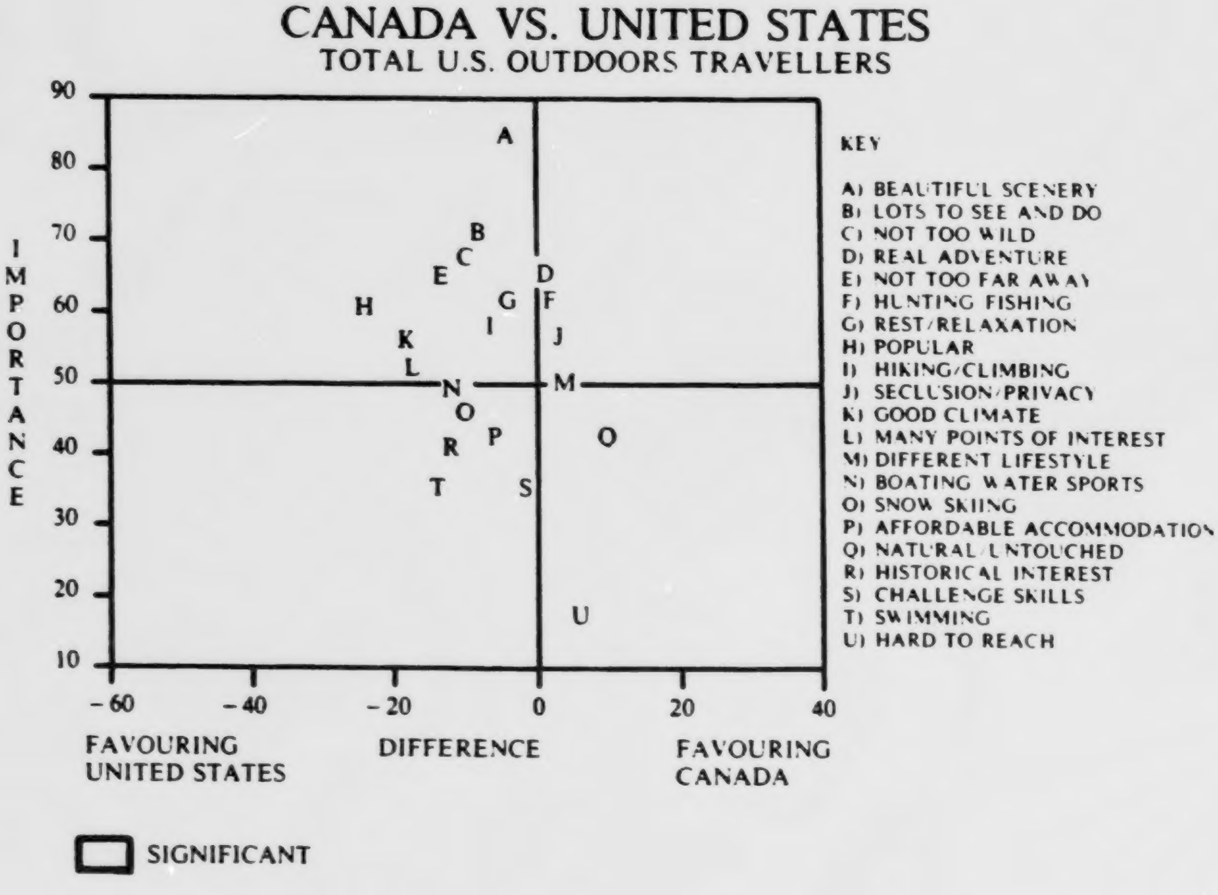
Table 4.3.1 indicates figures for New Brunswickers travelling within New Brunswick. Data are from the New Brunswick travel data of 1984. Global figures are not comparable with figures for market areas II and III since person-trip is the unit of analysis and not party visitor. Data are less detailed than in the New Brunswick Exit Survey and categories available for charateristics of parties and of the travel are not similar to what was available for market areas II and III. These data should be examined with caution especially as far as totals are concerned.

If 1984 percentages are still valid, they indicate a high propensity of New Brunswickers to travel within their own province (67.7%) More recent Touriscope data in 1986 tend to confirm this situation to some extent (61%).

As regards the characteristics of the travel, camping (6%) is less popular than for market areas II and III (18% for market area III and 38-47% for market area II). Among activities

FIGURE 4.2.2

THE CANADIAN OUTDOORS DESTINATION
AS PERCEIVED BY THE AMERICAN TOURIST MARKET



Source: The U.S. Travel Market Study Canadian Potential Highlights Report, Tourism Canada, January, 1986, p. 32.

TABLE 4.3.1

MARKET AREA IV

NEW BRUNSWICK RESIDENT TRIPS

NEW BRUNSWICK TRAVEL DATA 1984)

PERSON-TRIPS COMPLETED BY NEW BRUNSWICKERS

TRAVELLING WITHIN NEW BRUNSWICK*

N= 1 687 000

CHARACTERISTICS OF PARTIES

Party composition:	
Adults only	59.3%
Adults with children	40.7%

Gender:	
Male	36.8%
Female	42.6%
Under 15 years	20.6%

Destination of New Brunswickers	
Within NB	67.7%
Outside NB	32.3%

Data from Touriscope 1986, Domestic travel (Canadians travelling in Canada) indicates that New Brunswickers account for 61% of person trips within New Brunswick for 30% of their travel spending. These figures may be increased by the present provincial government promotional campaign favoring travel within the Province.

CHARACTERISTICS OF THE TRAVEL

Type of accomodation:	
Friends and relatives	64.7%
Motel	13.2%
Hotel	6.4%
Camping	6.0%

Expenditures	
Within NB	38%
Outside	62%

Activities participated in	
Visiting friends and relatives	29.3%
Shopping	21.0%
Sightseeing/touring	6.3%
Sports/outdoor activities	5.7%

Period	
Weekend only	52.4%
During the week	46.5%

Tourism region of destination	
St John River	40.3%
Acadian Shore South	21.8%
Fundy	19.4%
Acadian Shore North	7.1%

---

* From the Canadian Travel Survey conducted for every quarter of 1984.

participated in, sports and outdoor activities account for a small percentage (5.7%) as compared to visiting friends and relatives (29.3%). However these percentages are not comparable to those for activities interested in for market areas II and III. The most popular regions of destination are St. John River 40.3% and the Acadian Shore South 21.8%.

SUMMARY OF CURRENT AND POTENTIAL DEMAND CHAPTER 5

5.0 SUMMARY OF CURRENT AND POTENTIAL DEMAND

Analysis of current markets of KNP has allowed us to get a good understanding of the characteristics of numerous summer and winter market segments. The a posteriori segmentation approach was useful to summarize the overall distinctive structure of both the summer and the winter current markets.

Concluding on part A of this report, it appears that the available secondary data from the New Brunswick exit survey is very limited for market potential assesment. Further data are needed and will be used in part B of the report to get a better measure of potential and possible market capture in relation to specific target market priorities.

PART

B

Z B A

Zins Beauchesne et Associés

Analyse et Planification Marketing

MARKET MANAGEMENT STRATEGY RECOMMENDATIONS KOUCHIBOUGUAC NATIONAL PARK

PART B

CONTRACT NO: ARO 88-27
MARKET ANALYSIS

PRESENTED TO:

THE CANADIAN PARKS SERVICE
ATLANTIC REGIONAL OFFICE
SOCIO-ECONOMIC SECTION

BY:

ZINS BEAUCHESNE AND ASSOCIATES
990, DE BOURGOGNE
SUITE 101
STE-FOY (QUEBEC)
G1W 2L5

JULY 4, 1989

MARKET MANAGEMENT STRATEGY RECOMMENDATIONS

PREPARED FOR

THE CANADIAN PARKS SERVICE
ATLANTIC REGIONAL OFFICE
SOCIO-ECONOMIC SECTION

ZINS BEAUCHESNE AND ASSOCIATES

990, DE BOURGOGNE
SUITE 101
STE-FOY, QUEBEC
G1W 2L5
(418) 657-2200

2005, PEEL
SUITE 1100
MONTREAL
H3A 3B8
(514) 843-8825

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EXECUTIVE SUMMARY

MARKET ANALYSIS
KOUCHIBOUGUAC NATIONAL PARK
EXECUTIVE SUMMARY

1.0 INTRODUCTION

Kouchibouguac National Park (KNP) is located in South Eastern New Brunswick and is a natural attraction in Atlantic Canada. The park main attractions are: the beach, outdoor recreation, nature interpretation and programs, camping and winter cross-country skiing.

1.1 STUDY PURPOSE

The purpose of this study was to segment, profile and analyze four market areas:

a) Area I - Current Park visitors
b) Area II - Highway 11 Tourists and Excursionists
c) Area III - New Brunswick Non Resident Tourists and Excursionists
d) Area IV - New Brunswick resident Tourists and Excursionists

An additional objective was to determine the characteristics, needs and expectations of all market segments included in the above market areas and to recommend how the Parks Service can better serve Kouchibouguac's current and potential visitors.

1.2 STRUCTURE OF THE REPORT

The report is structured in two parts. The first part (A) is the segmentation and profiling of Kouchibouguac four market areas. The second part (B) is based upon the results of part A and presents an analysis of the park offer in relation to market potentials and targets priorities. Specific marketing strategies are finally recommended for each target market in order to increase public awareness, appreciation and market capture of KNP and to better respond to current and potential park visitors needs and expectations.

1.3 STUDY METHODS

The research methods used were univariate, bivariate and multivariate statistical analyses of summer survey data completed during 1988 and winter survey data collected during 1986. Correspondence analysis was used as a multivariate technique to present graphical displays of contingency tables. Analyses of the resulting mappings allowed us to identify the market underlying structures (*a posteriori* segmentation) in terms of similarities in needs and expectations of current park visitors.

Analysis of potential visitors was based upon secondary data such as the New Brunswick Exit Survey of 1983, the Financial Post Survey of Markets 1986, Touriscope 1986, Domestic Travel Longwoods Research Group Inc. 1986 and Statistics Canada International Travel.

Strategic recommendations were based upon assessment of potential markets, current capture (or market penetration) and possible capture as defined in marketing principles and according to the theory of the diffusion of innovation.

1.4 MARKET SEGMENTATION

For the purpose of this study, market segmentation profiles were mainly based upon the geographic origin and visit purpose of summer parties. Winter visitors were analysed according to geographical origin. More detailed segmentation bases of current markets were also taken into account and presented graphically.

2.0 KOUCHIBOUGUAC NATIONAL PARK CURRENT MARKET

Kouchibouguac National Park has been visited by more than 120,000 visitors from January to December 1988. The summer season accounts for 64%, the winter season, 13% and the shoulder seasons 23%.

2.1 THE SUMMER MARKET

According to the summer survey of 1988, Kent County is the most important source of visitor parties (26.6%) followed by Other New Brunswick Counties, Quebec, Westmorland County, Ontario, U.S.A. and other countries, Atlantic except New Brunswick, Northumberland County and Other Canada.

The general park customer profile indicates that 45.5% of parties are English speaking and that the main reasons for visit (in decreasing order) are: the beach, camping and sightseeing. The percentage of first visit is 39.5% and 46.3% of the visitor parties are aware of KNP conservation mandate. The main interpretation programs participated in (in decreasing order) are: the Visitor Reception Center (VCR), Boardwalk exhibits and VCR exhibits. The dominant party composition (in decreasing order) are: family with children and couple. The average party size is 3 persons and the main sources of trip information (in decreasing order) are: Friends and/or relatives, tourist bureau, and tourist guide.

The analysis of summer parties by origin has been examined on an a posteriori basis using the mapping approach. The interpretation of mappings indicates a global summer market structure of two segments with the following distinctive characteristics:

Segment 1: Parties from Kent, Northumberland and Other New Brunswick (51.8%).

- Prefer fun, personal well being and more sportive activities.
- Prefer family programs.
- Tend to be group of friends or families with children.

Segment 2: Parties from Quebec, Ontario, U.S.A., Westmorland *, and Atlantic (except New Brunswick) (48.2%).

- Prefer nature, scenic and less sportive activities.
- Prefer educational programs.
- Tend to be more in couples without children.

---

* Westmorland is not always clearly associated with the second segment especially as regards summer programs.

2.2 THE WINTER MARKET

According to the winter survey of 1986, the centre of Kent County is the most important source of visitors followed by visitors coming from 10 to 25 kilometers, those coming from more than 25 kilometers, from Westmorland and from Other New Brunswick. Forty four percent (44 %) of the day-time skiers are coming 1 to 5 times per month. Twenty seven percent (27 %) of day-time skiers are spending one to one and a half hour in the park. Seventy seven percent (77 %) of the visitors are coming for cross-country skiing. Weekend visitors account for 62% of the total. The dominant party composition (in decreasing order) is: alone, couple and group of friends.

The analysis of winter parties by origin has been examined on an a posteriori basis using the mapping approach. The examination of the mappings indicates a global winter market structure of three segments with the following distinctive characteristics.

Segment 1: Parties from Centre Kent (44%)

- Prefer weekdays visit of 1h30 at most.
- Prefer sightseeing and are skiing more than 5 times/month.
- Plan to come 20 times or more.
- Tend to be alone without children under 12.

Segment 2: Parties from middle Kent and Other Kent (34.9%)

- Prefer weekend visit of 1h30 to 3h.
- Use the waxing Chalet
- Plan to come less frequently than segment 1.
- Tend to be couples or friends.

Segment 3: Parties from Westmorland and Other New Brunswick (20%).

- . Are less frequent cross-country skiers.
- . Spend more than 3h in the park.
- . Tend to use the restaurant (Westmorland) or bring lunch (other N.B.).
- . Use the Reception Centre.
- . Plan to come less frequently than segment 2.
- . Tend to be family with children or groups.

2.3 THE ECONOMIC IMPACT

The economic impact of summer parties coming from outside Kent County is also examined. Results from the summer survey of 1988 indicated that the mean length of trip in New Brunswick was 5 days and that the mean time spent in Kent County was 3.48 days. The mean total expenditures per party for the stay in Kent County was $146.00. The economic contribution is provided by party origin in terms of number of parties, time and dollars spent in Kent County. Hence, the relative contribution of parties from different origins can be examined in relation to number of parties, time and dollars spent in Kent County.

3.0 ANALYSIS OF THE PARK OFFER

Global objectives and orientations of Natural Parks are interrelated with the use of natural resources, public activity and local integration of Kouchibouguac National Park (KNP). The specific offer of KNP is structured around the following elements:

- a natural seashore experience that can be visited through a network of trails;

- a beach in a natural setting;

- a recreational park with a variety of outdoors activities;

- a campground by the sea;

- a winter park for cross-country skiing.

4.0 MARKET POTENTIALS, TARGETS AND PRIORITIES

4.1 CURRENT MARKETS

First, current markets structure is reviewed in terms of percent of French speaking and repeat visit by origin. French speaking is above 50 % for parties from Kent County, Quebec and Westmorland County. Repeat visit is above 50 % for parties from Kent County, other New Brunswick, Westmorland and Northumberland Counties. Current markets are also examined for dominant and distinctive activities. As indicated in part A of the report a global structure of two segments is revealed by multivariate analysis. This structure is related to the distinctive activities participated in by summer parties. The first segment prefers more sportive activities related to fun and personal well being and is composed of parties from the local regional or provincial areas. The second segment prefers less sportive activities more related to nature and education programs and is composed of parties coming from outside New Brunswick.

4.2 POTENTIAL MARKETS

Potential markets are then reviewed and measured under the assumption of the absence of competition and of a sufficient marketing effort. The local market of Kent County and Northumberland is estimated at 86,700 person-trips, route 11 (market area II) accounts for 110,010 potential person-trips, visitors from outside New Brunswick (market area III) amount to a global potential of 770,451 person-trips per year and New Brunswick residents (market area IV) accounts for 1,687,000 person-trips per year. The total potential market (excluding route 11 which is a part of market areas III and IV) is then estimated at 2,544,151 person-trips per year, if an optimal marketing effort is made.

Specific profiles of each potential market are then presented in terms of origin, trip motivations, activities and camping as accommodation. Seasonal profiles for each quarter are also indicated for each potential markets. The following potential market profiles are available:

- Profile of Kent and Northumberland Counties;
- Profile of New Brunswick non-resident tourists and excursionists (market area III);
    - Quebec tourists travelling outside Quebec;
    - Ontario tourists travelling outside Ontario;
    - American tourists travelling in Canada;
    - Atlantic tourists (other than New Brunswick) travelling in Canada.
- Profile of New Brunswick residents travelling within New Brunswick (market area IV).

4.3 CAPTURE OF POTENTIAL MARKETS

Potential market capture is defined as the current level of visit divided by potential of specific New Brunswick visitors. The current capture is estimated at 5.1 % for all markets. As regards the local market, current capture is at 44.8 %, for market area III (outside New Brunswick) it is 4.3 % and for market area IV it is 1.7 %.

4.4 TARGET MARKET PRIORITIES

Each specific target markets within market areas II, III and IV are examined in relation to seven main objectives of KNP. Priorities are also established for each of the four seasons.

5.0 MARKETING STRATEGY AND PLANNING

In relation to priorities, estimations of targetable penetration rates are established in relation to specific marketing programs. The following level of yearly person-trips in four years from now are proposed as attainable objectives:

- Local market	45 466 person-trips
- Highway 11	8 251 person-trips
- New Brunswick residents	126 525 person-trips
- Market outside New Brunswick	
. Quebec	17 900 person-trips
. Ontario	2 975 person-trips
. USA	3 339 person-trips
. Atlantic (other than N.B.)	33 000 person-trips

A master marketing strategy is proposed with the priority emphasis on local markets to increase the awareness of the mission and mandate of KNP. Regional markets are given priority for off seasons periods. Following, in decreasing order of priority are: Route 11, New Brunswick residents, Quebec, Atlantic, Ontario and USA.

KNP central positionning should be structured around a national park on a seashore, with a secondary positionning including the natural beach, playground and campground.

Detailed suggestions are also included as regards each elements of the appropriate marketing mix for KNP. Recommendations are proposed in terms of the product offering, access to the park, pricing strategy, visibility, promotion and various communication activities.

6.0 TARGET MARKETS APPROACHES AND MARKETING MIXES

Specific marketing approaches supported by a specific marketing mix are indicated for each target market. Tables are developed to present the origin, the motivations, the level, the objectives and the justification of the priority for each market. Then action programs are detailed for each market in terms of product, pricing, access, communication and promotion.

The park offer is presented in detail in appendix I and suggestions to improve market analysis and management strategy recommendations are included in appendix II.

INTRODUCTION CHAPTER 1

1.0 INTRODUCTION

The present report is part B of the market study for Kouchibouguac national park; it contains the recommendations for a market management strategy for the park, based on the segmentation analysis of the market presented in part A.

The objectives of the study underlying these recommendations are to recommend how the Canadian Parks Service can better serve Kouchibouguac's current and potential visitors and to increase the park's capture from potential markets.

Based upon the results of the market analysis and segmentation the consultant has developed a set of recommendations for increasing public awareness, appreciation and market capture of Kouchibouguac National Park and for better responding to current and potential park visitor needs and expectations.

The market study provides an information basis for:

- identifying and describing current and potential park market segments;

- suggesting target market segments and identifying tourist's and excursionist's needs and expectations;

- identifying and sustaining continuation, and enhancement of current programs, services and facilities and providing new services and programs to satisfy these target market needs and expectations.

The following pages will thus suggest ways and means:

- to meet the needs and expectations of current and potential park visitors;
- to raise awareness and interest in park use and opportunities from suggested target markets;
- to increase the capture of suggested target segments.

All this within the constraints implied by the needs for natural resource conservation, fiscal restraints and policy guidelines governing park use.

After the statement of the global objectives of natural parks and the definition of the issues facing Kouchibouguac National Park and its long term development objectives, an overview of the park offer is presented, current and potential markets are evaluated, and recommendations are made for setting priorities on target markets, developping a marketing strategy and plan, as well as specific marketing approaches and mixes to capture particular target markets.

GLOBAL OBJECTIVES OF NATIONAL PARKS CHAPTER 2

2.0 GLOBAL OBJECTIVES OF NATIONAL PARKS

The Canadian Parks Service policy specifies that National Parks should be preserved forever in a representative network of natural areas. They constitute a natural heritage for all Canadians and future generations to come. Global objectives are to help the public to know how to appreciate and to enjoy this natural heritage.

The zoning plan is one of the most important parts of the management of national parks. Five specific zoning areas are proposed with a gradual degree of required preservation inversely related to the presence of public activities. Protection of natural resources without modification by human activities is an important objective of the park policy.

Public knowledge and enjoyment of National parks without damaging the natural heritage resources is another objective of the park policy. Outdoor activities are organized for visitors in so far as they do not damage the natural environment. Information and interpretation programs are an integral part of the park policy. Education programs are set up to promote knowledge and appreciation of the natural resource among visitors and groups of visitors.

Commercial facilities and services are located as much as possible outside national parks. Only required services for the public are accepted in specific zoning areas.

The park policy specifies also that the private sector and the local economy is invited to participate in the development and operation of approved facilities and services. In so far as possible the park activities should be integrated with the local tourism industry.

2.1 LONG TERM DEVELOPMENT OBJECTIVES AND ORIENTATIONS

Kouchibouguac National Park has to be developed within a set of parameters, principles and objectives, that must be taken into account when setting market priorities and marketing strategies.

Heritage of the Park

Protection and preservation of the natural and cultural heritage of the park will remain a fundamental mission of the Canadian Parks Service. It will maintain an equilibrium between the objective of conservation and the use of resources by the users of the park. However conservation will get a greater priority.

In a long term perspective, protection and conservation of the sea shore zone, which is the geographical justification of the park, will remain the first priority of the park's managers.

All the objectives, in accordance with the foundations of the national parks, as well as the management principles and activities, and the communication programs, will mainly be oriented toward the natural values and components of the park's heritage.

Use of the park

- The Canadian Park Service wants to maintain in a midrange term perspective, the average increase of the total park level of visit seen over the last three years (4 %).
- The park management wants also to increase the understanding and the enjoyment of the park by a bigger part of the public.
- The park wants to encourage and favor an increase of the visits in the park during shoulder seasons (May, June and September, October) and during winter.
- The park finally wants to improve and diversify the experience of visitors and the possibilities of usage.

Education interpretation

The park will have to fully play its role in the education of the public in accordance with the mandate of the park itself and the entire network of national parks, the objectives of Environment Canada, and the environmental issues of society.

In this regard the park will have to interpret its natural and cultural heritage.

Regional integration

The Canadian park service will work to maintain and increase the positive socio-economic and environmental impacts, of its presence and of its use by tourists and excursionists, for local communities and the region.

And in order to favor the development of the regional tourism industry, the park, through its communication programs will develop the concept of regional offer, which associates the park and its neighbouring region.

2.2 ISSUES FACING KOUCHIBOUGUAC NATIONAL PARK

In relation to national park policy, Kouchibouguac National Park (KNP) has to deal with decisions related to the use of natural resources, public activity and enjoyment, and local integration.

As regards natural resources, commercial fishing rights within the park boundaries must be balanced against preservation of the resource. Recreational and sport fishing also need to be addressed. Management of access roads within the park and protection of the fragile dunes should be considered in relation to facilitating access to visitors.

With respect to public understanding, activity and enjoyment, additional activities (primitive campsite, canoeing, guided tours, trails, fishing wharves, picnicking) and services (camping, boat tours and guided nature tours, equipment rental, food services, sleigh rides) must be examined in relation to possible conflict among activities and services or park policy. Various marketing and promotion approaches for these additional activities and services must also be addressed.

Concerning local and regional integration the contribution of the park to local and regional economics requires planning in terms of employment, expenditures and further development of the Park's Public Relations in Kent county.

OVERVIEW OF THE PARK OFFER

CHAPTER 3

3.0 OVERVIEW OF THE PARK OFFER

Kouchibouguac National Park offers a plural experience to visitors:

- it is a natural park offering the view of a magnificent seashore and a variety of habitats and fauna, to be visited through a network of marked trails, with the help of signs, guides and audio visual material in the Visitor Reception Center;

- it is a beach, in a very natural setting, offering bathing, playing and suntanning to families or individuals in a safe and clean environment;

- it is a recreational park offering a variety of outdoors activities, biking, canoeing, fishing and hiking;

- it is a campground offering a unique experience of living outdoors by the sea;

- a winter park for cross-country skiing.

The particular features supporting these five offerings are mainly:

- trails and observation areas;
- beaches;
- summer activities and services;
- winter activities and services;
- campgrounds and picnic facilities;
- a Visitor Reception Center.

In order to facilitate the enjoyment of the park by visitors, some services are offered by private enterprises within the park: a snack stand, a rental business which provides bicycles, canoes and boats, and a restaurant serving seafood. Outside the park there are a few facilities for lodging including motels and campgrounds and for dining.

More detailed information on the product offered by KNP and the area are presented in Appendix I.

MARKETS: POTENTIAL, TARGET AND PRIORITIES

CHAPTER 4

4.0 MARKETS: POTENTIAL, TARGET AND PRIORITIES

The following pages present the different markets for Kouchibouguac National Park: the current markets first, then potential markets. For each potential market, a total theoretical potential is estimated, the present capture rate is calculated, and a profile is presented including characteristics, origin and travel motivations.

4.1 CURRENT MARKETS

As indicated in part A, current markets for Kouchibouguac National Park (KNP) represent a total of 129 528 visits from January to December 1988. During the summer season (from June 1st to August 31st) 82 763 visits were observed for 64 % of the total. During the winter season (from January 1st to March 31st) 16,839 visits were recorded for 13 % of the total. During the shoulder seasons (from April 1st to May 31st and from September 1st to December 31st) 29 926 visits were recorded for 23 % of the total.

The detailed structure of current markets in terms of profiles by origin and visit purpose is presented in part A and is the result of surveys conducted during the summer of 1988 from July 8th to September 5th and during the winter of 1986 from February 3rd to March 9th.

Results from the summer survey are based on a weighted total of 21,416 parties. A summary profile of summer parties by origin is presented in table 4.1.1 (further details are available in part A of the report). As shown in table 4.1.1, KNP current markets are predominently French speaking (above 50 %) when parties are from Kent County, Quebec and Westmorland County. Further, parties coming mostly on a repeat visit (above 50 %) are from: Kent County, other New Brunswick, Westmorland and Northumberland Counties. As regards awareness of the conservation mandate, it is above 50 % for parties from Quebec, Westmorland and Northumberland Counties.

Table 4.1.2 presents a summary of most dominant activities participated in by parties of different origin. Activities are ordered in decreasing order of frequency of use. Beachwalk is the most frequently observed activity for the first seven market origins. Since dominant activities do not differ very much from one origin to another, activity dominance is not very useful to develop specific marketing approaches to meet distinctive needs by party origin. Distinctive activities are those activities mostly participated in by parties from one specific origin as compared to other origins. These activities are listed in decreasing order of distinctiveness (results presented in table 4.1.2 are derived from the cross-tabulation of origins by activities where dominance was obtained from column percentages in decreasing order and where distinctiveness was obtained from row percentages in decreasing order).

Distinctive activities differ from origin to origin and can be used to develop specific marketing approaches to meet specific needs by party origin. As indicated in table 4.1.2, parties from Kent County are distinctive in terms of fishing, boating and canoeing, other New-Brunswick parties distinguish themselves by sightseeing, Quebec parties are distinctive in terms of nature study and hiking etc. (this overall market structure is revealed in figure 1 of the perceptual mapping of origin by activities presented in part A of the report).

Looking at the overall size of the different current markets in table 4.1.1, it can be noted that the local markets from Kent, Westmorland and Northumberland counties account for 39.6 % of parties. Overall, parties from New Brunswick account for 60.5 % of Kouchibouguac National Park current markets. Hence one feature of the Park's current market is that it is heavily dependent upon the local, regional markets and to some extent on the provincial market.

A crosstabulation of origin of visitor parties with summer activities indicates that some activities are popular for all visitors such as sunbathing, swimming and beachwalk and some activities such as fishing, boating and canoeing are less popular. It is however difficult to detect any clear relationship between summer activities and origin. A correspondence analysis is then applied to the data, and results are presented in a graphical display (Figure 4.1) that summarizes the information.

In figure 4.1, the closer an activity to a segment, the more likely the participation of the segment in the activity. The horizontal axis seems to represent activities more related to nature on the left and activities more related to fun and well being on the right. The vertical axis can be interpreted as a decreasing degree of sportiveness, more sportive activities being in the lower part of the figure and less sportive activities being in the upper part. In addition to the relative distances between market segments and activities, their relative closeness to the centre of the figure indicates how typical the market or the activity is from the average.

According to the market structure emerging from figure 4.1, two clusters seem to emerge (the lower right of the figure with KE, NO and NB and the upper left with QC, US, ON, WS).

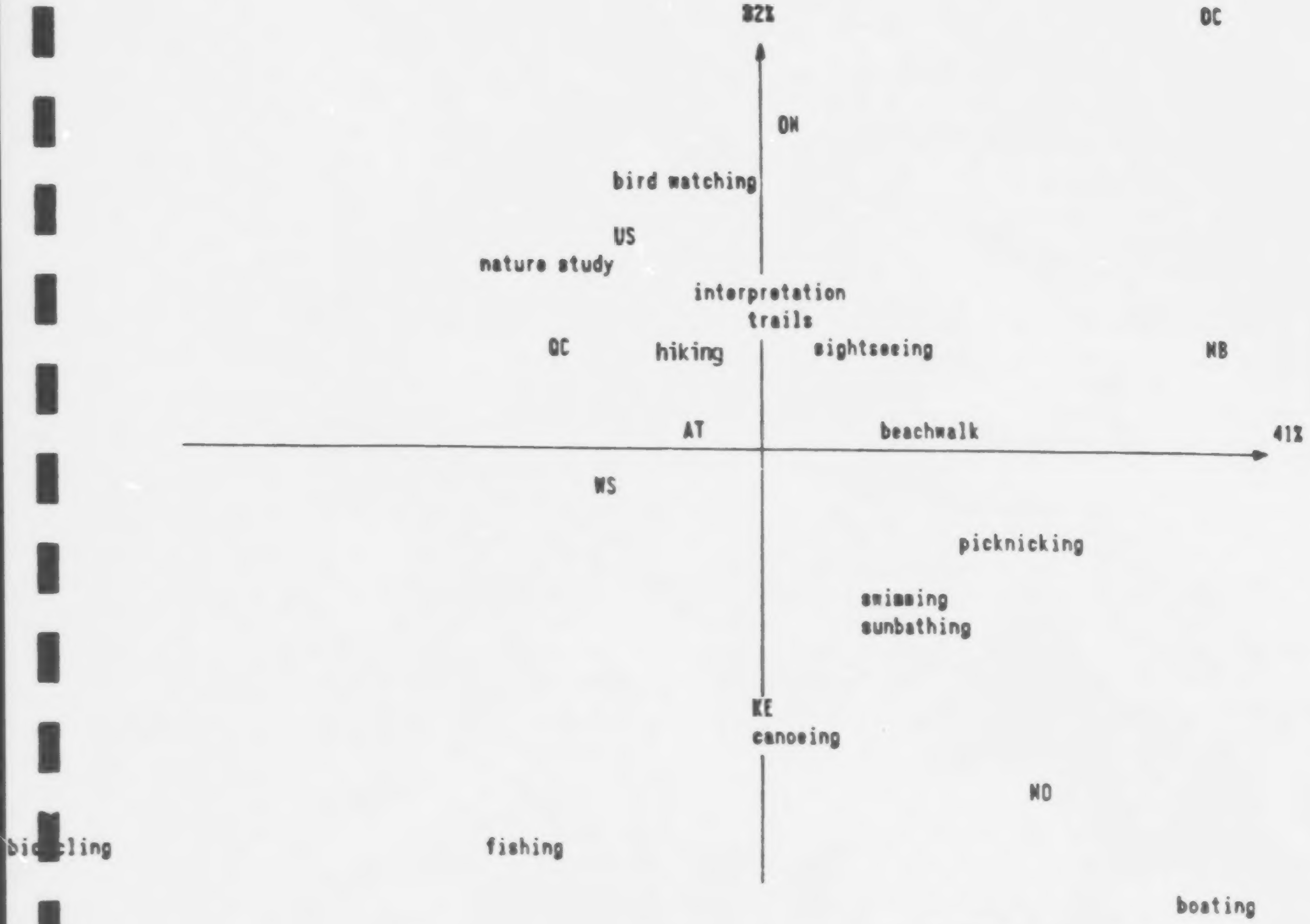
Therefore, an overall structure of two segments presenting distinctive characteristics is suggested:

-Parties from Kent (KE), Northumberland (NO) and other New Brunswick (NB) tend to prefer more sportive activities such as canoeing, boating, and activities more related to fun and personal well being (beachwalk, swimming-sunbathing and picnicking).

-Visitor parties from Quebec (QC), U.S.A. (US), Ontario (ON), Westmorland (WS) and Atlantic except New Brunswick (AT) are more likely to prefer activities related to nature (nature study, birdwatching) and less sportive activities (interpretation trails, hiking, sightseeing.

FIGURE 4.1

MAPPING OF SUMMER PARTIES ACCORDING TO ORIGIN AS A FUNCTION OF ACTIVITIES IN THE PARK



LEGEND	% PARTIES
KE: Kent	26,6%
WS: Westmorland	8,7%
NO: Northumberland	4,3%
NB: Other New Brunswick	20,9%
AT: Atlantic	5,0%
QC: Quebec	19,8%
ON: Ontario	7,7%
OC: Other Canada	0,9%
US: U.S.A.	6,1%

ACTIVITIES	% PARTIES
Beachwalk	87,0%
Sightseeing	75,1%
Sunbathing-swimming	75,0%
Picnicking	65,2%
Interpretation trails	58,4%
Nature study	53,5%
Hiking	47,0%
Bird watching	45,9%
Bicycling	38,0%
Canoeing	21,4%
Boating	15,5%
Fishing	3,9%

A visualization of the dominant contribution of each party origin is possible with the mapping resulting from correspondence analysis. Figure 4.2 shows, for each origin, their relative contributions (%) in relation to number of parties (vi), number of days (ti) and expenditures spend in Kent county. As we can see, each origin presents a different relative proximity to each of the three elements within boxes on the graphical display.

The results in figure 4.2 suggest the emergence of the three following segments:

- Northumberland (NO), Quebec (QC) and Westmorland (WS) contributing mostly in terms of amount of expenditures ($$) spend in Kent County;
- USA (US) and other New Brunswick (NB) contributing mostly in terms of number of days (ti) spend in Kent County;
- Atlantic (AT), Ontario (ON), Foreign (FO) and other Canada (OC) contributing mostly in terms of parties (vi) coming to Kent County.

FIGURE 4.2

MAPPING OF RELATIVE NUMBER OF PARTIES DAYS AND DOLLARS
SPENT IN KENT COUNTY BY PARTIES ORIGIN

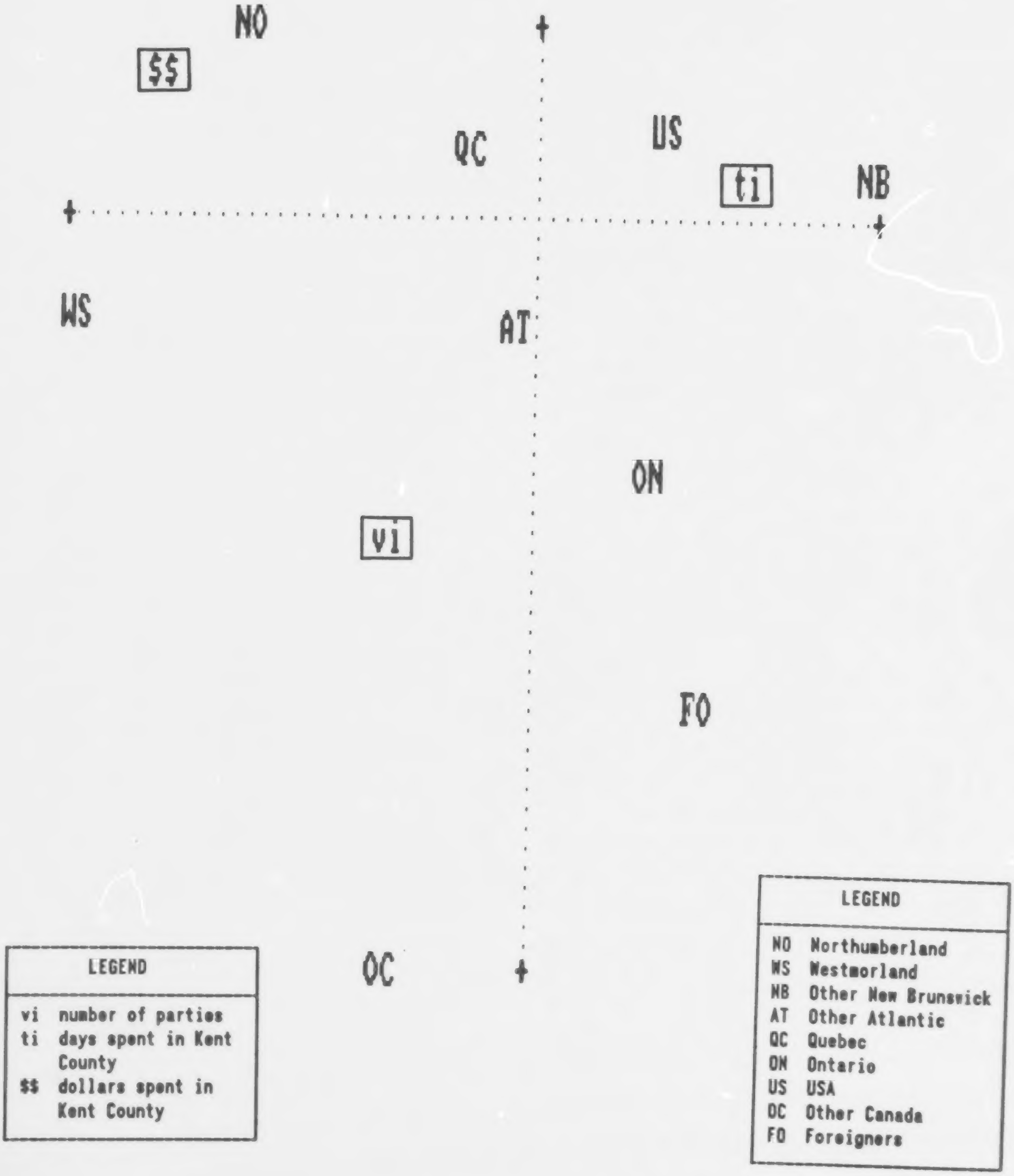


TABLE 4.1.1

SUMMARY OF KOUCHIBOUGUAC NATIONAL PARK
CURRENT MARKET PROFILES BY ORIGIN
(SUMMER SURVEY FROM JULY 8th TO SEPTEMBER 5th 1988
BASED ON A WEIGHTED TOTAL OF 21 416 PARTIES)

ORIGIN	PERCENT OF CURRENT MARKET	PERCENT FRENCH (ENGLISH) SPEAKING	PERCENT OF FIRST VISIT (REPEAT)	AWARENESS OF MANDATE
KENT	26.6 %	82.3 % (17.7 %)	6.0 % (94.0 %)	42.5 %
OTHER NEW-BRUNSWICK	20.9 %	36.4 % (63.6 %)	36.4 % (63.6 %)	41.8 %
QUEBEC	19.8 %	91.3 % (8.7 %)	66.3 % (33.7 %)	63.4 %
WESTMORLAND	8.7 %	51.3 % (48.7 %)	15.4 % (84.6 %)	53.8 %
ONTARIO	7.7 %	15.3 % (84.7 %)	69.5 % (30.5 %)	42.4 %
U.S.A	6.1 %	2.9 % (97.1 %)	76.3 % (23.7 %)	28.8 %
OTHER ATLANTIC	5.0 %	0 % (100.0 %)	64.9 % (35.1 %)	40.1 %
NORTHUMBERLAND	4.3 %	26.3 % (73.7 %)	10.5 % (89.5 %)	57.9 %
OTHER CANADA	0.9 %	0 % (100.0 %)	100.0 % (0.0 %)	33.3 %

Note:

1. Percentages above 50 % are underlined in each appropriate column.
2. A 0 % French speaking for other Atlantic and Other Canada is the result of two small biased sub-samples as regards this specific variable.

TABLE 4.1.2

SUMMARY OF KOUCHIBOUGUAC NATIONAL PARK CURRENT MARKET ORIGINS FOR DOMINANT AND DISTINCTIVE ACTIVITIES PARTICIPATED IN BY SUMMER PARTIES

(SUMMER SURVEY FROM JULY 8th TO SEPTEMBER 5th 1988
BASED ON A WEIGHTED TOTAL OF 21 416 PARTIES)

CURRENT MARKET RANKING IN NUMBER OF PARTIES	ORIGIN	DOMINANT ACTIVITIES (IN DECREASING ORDER)	DISTINCTIVE ACTIVITIES (IN DECREASING ORDER)
1st	Kent	Beachwalk, sunbathing-swimming, picknicking	Fishing, boating, canoeing
2nd	Other New-Brunswick	Beachwalk, picknicking, sunbathing-swimming	Sightseeing
3rd	Quebec	Beachwalk, sunbathing-swimming, sightseeing	Nature study, hiking
4th	Westmorland	Beachwalk, picknicking, sightseeing	Bicycling, hiking
5th	Ontario	Beachwalk, sightseeing, sunbathing-swimming	Birdwatching
6th	U.S.A.	Beachwalk, sightseeing, interpretation trails	Birdwatching
7th	Other Atlantic	Beachwalk, sightseeing, sunbathing-swimming	Interpretation trails, hiking
8th	Northumberland	Sunbathing-swimming, beachwalk, sightseeing	Boating
9th	Other Canada	Too few observations	Too few observations

4.2 POTENTIAL MARKETS

Kouchibouguac National Park has several potential markets on which it can draw visitors:

- The local and regional market;
- Route 11;
- New Brunswick residents;
- Out of New Brunswick residents, mainly:
    - Quebec;
    - Ontario;
    - North Eastern U.S.;
- Overseas markets.

A potential market is considered here to be a market in which it is theoretically conceivable to attract any person being part of it, if sufficient promotional activity were conducted, competition was absent, and no peculiar circumstantial hindrance would prevent visitors from coming to the park.

The size of the potential market is determined by the number of people being part of the potential market. For each KNP's markets the yearly theoretical potential is calculated on objective statistics. In each case, the process and figures used are explained.

The achievable level of capture of the potential market however will be determined by the actual level of promotion invested by the park and its ability to deal with the level of visitors achieved.

4.2.1 Potential of total market

The potential of total market is presented in detail below for the local market, market area II (Route 11), market area III (New Brunswick non-residents) and for market area IV (New Brunswick residents).

LOCAL MARKET

The local market includes Kent and Northumberland counties. Westmorland is excluded because its residents tend to have a more urban behavior than Kent and Northumberland Counties residents and more similar to other New Brunswickers.

The potential of global local market corresponds to the total population of the two counties:

Kent county = 32 200(1)
Northumberland = 54 500(2)
Potential of local market = 86 700 person-trips

Theoretically, these 86 700 people are potential park visitors. With the allocation of maximum marketing efforts to attract them, any person interested in outdoor recreation, beach, sightseeing and camping could be a KNP visitor, at least one time a year. This would represent a potential of 86 700 person-visits. Of course other ways of evaluating this potential and the related capture could be used, namely taking into account the existence of heavy users of the park on one side, and light and non users of the park on the other side.

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(1) (2) Source: Canadian Markets 1986. The Financial Post Information Service, 61st edition.

MARKET AREA II (ROUTE 11)

Market area II is itself a potential market. Indeed, any tourist and excursionist visitor party passing through Kouchibouguac on highway 11 could go to the park because highway 11 leads to KNP.

It is essential to be cautious when considering this market area. In order to avoid possible double counting of visitors we have to take in account that a part of this market may be considered in other markets (local, market area III, or market area IV). Data, as collected, do not allow a more precise and reliable analysis of this market, especially by origin.

From the 1983 Automobile exit survey, only the number of parties was available. Rather than estimate the number of visitors by multiplying parties number by average party size(3), we have extrapolated the number of visitors with the next ratio.

$$\text{Ratio} = \frac{\text{number of person-trips (market area III)}^{(4)}}{\text{number of tourists and excursionists parties (market area III)}^{(5)}}$$

$$= \frac{1\ 328\ 360}{1\ 096\ 062} = 1.21$$

90 918 (number of tourists and excursionists parties)(6) x 1.21 = 110 010 visitors per year.

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(3) Because multiplication of parties number by average party size for market III results to a number of visitors much higher than the number of person-trips found in Touriscope 1986, Domestic Travel.

(4) Source: Touriscope 1986, Domestic Travel.

(5)(6) Source: 1983 New Brunswick Exit Survey.

Route 11 potential market by activities interested in(7)(8):

- beach/swimming 13.0 % x 110 010 = 14 301 visitors
- sightseeing 68.5 % x 110 010 = 75 357 visitors
- outdoors N.A.
- nature 47.8 % x 110 010 = 52 585 visitors

Route 11 potential market by origin(8):

- Quebec 36.2 % x 110 010 = 39 824 visitors
- Ontario 25.0 % x 110 010 = 27 503 visitors
- U.S.A and other counties 19.8 % x 110 010 21 782 visitors
- Atlantic 12.5 % x 110 010 = 13 751 visitors
- Other Canada 6.2 % x 110 010 = 6 821 visitors

MARKET AREA III (OUTSIDE NEW BRUNSWICK)

QUEBEC

The potential of Quebec market corresponds to the number of Quebecer person-trips to New Brunswick = 179 000 person-trips(9)

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(7) Categories are not mutually exclusive.

(8) Source: 1983 New Brunswick Exit Survey.

(9) Source: Statistique Canada, 1986 - Touriscope, Voyages Intérieurs. Canadiens voyageant au Canada.

Quebec potential market by quarter(10):

- quarter I (January to March)=20.6 % x 179 000= 36 874 person-trips;
- quarter II (April to June) =22.2 % x 179 000= 39 738 person-trips
- quarter III (July to Sept.) =41.9 % x 179 000= 75 001 person-trips
- quarter IV (October to Dec.)=15.3 % x 179 000= 27 387 person-trips

Quebec potential market by activities interested in(11)(12):

- sightseeing 14.9 % x 179 000 = 26 671 person-trips
- swimming/bathing 9.2 % x 179 000 = 16 468 person-trips
- outdoors 8.0 % x 179 000 = 14 320 person-trips
- visit of sites 6.8 % x 179 000 = 12 172 person-trips
- visit of National Park 3.4 % x 179 000 = 6 086 person-trips

ONTARIO

The potential of Ontario market can be estimated as being the total number of person-trips taken by Ontarian to New Brunswick = 119 000 person-trips(13).

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(10) Source: Les voyages de plus de 24 heures des Québécois au Québec et à l'extérieur du QUébec en 1984.
(11) Source: Les voyages de plus de 24 heures des Québécois au Québec et à l'extérieur du Québec en 1984.
(12) Categories are not mutually exclusive.
(13) Source: Ministère du Tourisme, Nouveau-Brunswick.

Ontario potential market by quarter(14)

- quarter I (January to March) = 20.7 % x 119 000 = 24 633 person-trips
- quarter II (April to June) = 24.0 % x 119 000 = 28 560 person-trips
- quarter III (July to Sept.) = 34.0 % x 119 000 = 40 460 person-trips
- quarter IV (October to Dec.) = 21.3 % x 119 000 = 25 347 person-trips

Ontario potential market by type of trips(15):

- sightseeing (scenic tours) = 35.0 % x 119 000 = 41 650 person-trips
- outdoor trips = 15.0 % x 119 000 = 17 850 person-trips

UNITED STATES

Total person-trips taken by Americans to New Brunswick amounts to 362 934 person-pleasure trips to New Brunswick(16). Considering that the New Brunswick primary American market is composed by

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(14) Tourism in Canada by Canadians, by quarter.
Source: Domestic Travel, Catalogue No. 87-504; International Travel, Catalogue No. 66-201.

(15) Source: Enquête auprès des touristes d'agrément de l'état de New York, du Massachusetts et de l'Ontario, été 1987, Tourisme analyse et développement.

(16) . Source: Voyages internationaux, n° 66-201 au catalogue.
. Total person-trips to New Brunswick = 2 485 848.
. Total person-pleasure trips to Canada 5 575 000

$$\frac{\text{Total person-pleasure trips to Canada}}{\text{Total person-trips to Canada}} = \frac{5\ 575\ 000}{38\ 200\ 000} = 14.6\%$$

Thus, we assume that 14.6 % x 2 485 848 = 362 934 person-pleasure trips taken by Americans to New Brunswick.

north-east states (East North Central, New England) the potential American market is the total number of person-pleasure trips to New Brunswick multiplied by the percentage of total number person-trips in Canada taken by residents of these states(17):

36.8 % x 362 934 = 133 560 person-pleasure trips

U.S. potential market by quarter(18):

- quarter I (January to March)= 14.0 % x 133 560 = 18 698 person-pleasure trips
- quarter II (April to June) = 25.8 % x 133 560 = 34 458 person-pleasure trips
- quarter III (July to Sept.) = 41.9 % x 133 560 = 55 962 person-pleasure trips
- quarter IV (October to Dec.)= 18.3 % x 133 560 = 24 441 person-pleasure trips

U.S. potential market by type of trips(19):

- sightseeing (scenic tours) = 29.0 % x 133 560 = 38 732 person-pleasure trips
- outdoors trips = 19.0 % x 133 560 = 25 376 person-pleasure trips

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(17) Source: Le marché américain des voyages d'agrément, Longwoods Research Group inc., 1986, Tourism Canada.

(18) Source: Touriscope 1988, Le Tourisme au Canada, Statistic Canada.

(19) Source: Touriscope 1988, Le Tourisme au Canada, Statistic Canada.

ATLANTIC MARKET (OTHER THAN NEW BRUNSWICK)

The potential market (P.E.I., Nova Scotia, Newfounland) is the number of person-trips to New Brunswick = 333 000 person-trips(20).

ATLANTIC POTENTIAL MARKET BY ORIGIN(21):

- P.E.I. = 70 000 person-trips
- Nova Scotia = 253 000 person-trips
- Newfounland = 10 000 person-trips

ATLANTIC POTENTIAL MARKET BY QUARTER(22):

- quarter I (January to March)= 20.7 % x 333 000 = 68 931 person-trips
- quarter II (April to June) = 24.0 % x 333 000 = 79 920 person-trips
- quarter III (July to Sept.) = 34.0 % x 333 000 = 113 220 person-trips
- quarter IV (October to Dec.)= 21.3 % x 333 000 = 70 929 person-trips

ATLANTIC POTENTIAL MARKET BY TYPE OF TRIPS(23):

- visiting friends/relatives = 37,3 % x 333 000 = 124 209 person-trips

- shopping = 26,4 % x 333 000 = 87 912 person-trips
- sightseeing = 14,8 % x 333 000 = 49 284 person-trips
- nightlife/recreational activities = 9,5 % x 333 000 = 31 635 person-trips
- outdoors/others = 12,0 % x 333 000 = 39 960 person-trips

OVERSEAS MARKET

The potential market is the number of overseas visitors to New Brunswick = 5 891 person-trips(24).

Overseas potential market by origin(25):

- UK 21.0 % x 5 891 = 1 237 person-trips
- West Germany 11.2 % x 5 891 = 660 person-trips
- Japan 11.2 % x 5 891 = 660 person-trips
- France 7.4 % x 5 891 = 436 person-trips
- Australia 4.0 % x 5 891 = 236 person-trips
- Italy 3.8 % x 5 891 = 224 person-trips
- Netherlands 3.6 % x 5 891 = 212 person-trips
- South America 3.4 % x 5 891 = 200 person-trips
- Hong Kong 3.0 % x 5 891 = 177 person-trips
- Mexico 2.2 % x 5 891 = 130 person-trips
- Other 29.2 % x 5 891 = 1 720 person-trips

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(20)(21)(23) Touriscope 1988, Le Tourisme au Canada, Statistique Canada.

(22) Tourism in Canada by Canadians, by quarter.

(24) Source: Ministère du Tourisme, N-B.

(25) Percentages applied to the total number of person-trips to New Brunswick, represents origin of overseas visitors to Canada.
Source: Touriscope 1988, Le Tourisme au Canada, Statistic Canada.

Overseas potential market by quarter(26):

- quarter I (January to March)= 9.2 % x 5 891 = 542 person-trips
- quarter II (April to June) = 27.3 % x 5 891 = 1 608 person-trips
- quarter III (July to Sept.) = 47.8 % x 5 891 = 2 816 person-trips
- quarter IV (October to Dec.)= 15.7 % x 5 891 = 925 person-trips

GLOBAL POTENTIAL OF MARKET AREA III (New Brunswick non resident)

- Quebec	179 000
- Ontario	119 000
- U.S.A. (North East region)	133 560
- Atlantic (other than New Brunswick)	333 000
- Overseas	5 891

Global potential of market area III = 770 451 person-trips/ per year

Global potential of market area III by quarter

	QUEBEC	ONTARIO	U.S.A.(N.-E.)	ATLANTIC	OVERSEAS	TOTAL
Quarter I	36 874(20.6%)	24 633(20.7%)	18 698(14.0%)	68 931(20.7%)	542(9.2%)	149 679
Quarter II	39 738(22.2%)	28 560(24.0%)	34 458(25.8%)	79 920(24.0%)	1 608(27.3%)	184 284
Quarter III	75 001(41.9%)	40 460(34.0%)	55 962(41.9%)	113 220(34.0%)	2 816(47.8%)	287 459
Quarter IV	27 387(15.3%)	25 347(21.3%)	24 441(18.3%)	70 929(21.3%)	925(15.7%)	149 029
TOTAL	179 000	119 000	133 560	333 000	5 891	770 451

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(26) Source: Touriscope 1988, Le Tourisme au Canada, Statistique Canada.

MARKET AREA IV (NEW BRUNSWICK RESIDENTS)

The potential market corresponds to the number of person-trips of New Brunswickers residents travelling within New Brunswick = 1 687 000 person-trips(27).

POTENTIAL OF TOTAL MARKET

The summary of potential market for the local market, market area III and market area IV is as follows:

	POTENTIAL
Local market	86 700 person-trips
Market area III	770 451 person-trips
Market area IV	1 687 000 person-trips
Total market	2 544 151 person-trips

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(27) Source: New Brunswick Travel Data, 1984.

4.2.2. Potential market profiles

PROFILE OF LOCAL MARKET
(KENT AND NORTHUMBERLAND COUNTIES)

Kent County population	32 200(1) residents
Northumberland population	54 500(2) residents
Local market population	86 700 residents

N.B. In the present study each resident is considered as a potential person-trip.

Trip or excursion motivations(3):

- recreation (fishing - boating - canoeing - cross country skiing)
- beach
- sightseeing
- camping

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(1)(2) Source: Canadian Markets 1986. The financial Post Information Service, 61st edition.

(3) Source: . 1988 summer visitor survey (July 8th to September 5th)
. 1986 winter survey (February 3rd to March 9th)

PROFILE OF HIGHWAY 11 TOURISTS AND EXCURSIONISTS

Total number of tourists and excursionists parties	90 918
Total number of tourists and excursionists	110 010(1)
Total Kent visitor parties (N.B. non-residents)	25 709(2)
Total Kent visitors (N.B. non-residents)	31 108(3)

Activities interested in:(4)

	Tourists and excursionists parties	Kent visitor parties (N.B. non-residents)
- beach/swimming	13.0 %	N.A.
- sightseeing	68.5 %	68.9 %
- outdoors	N.A.	N.A.
- nature	47.8 %	54.2 %

Origin:

	Tourists and excursionists parties	Kent visitor parties
- U.S.A. and other counties	19.8 %	11.8 %
- Atlantic	12.5 %	10.6 %
- Quebec	36.2 %	34.8 %
- Ontario	25.0 %	14.6 %
- Other Canada	6.2 %	2.4 %
- Other New Brunswick		20.5 %
- Westmorland		4.1 %
- Northumberland		1.2 %
- Kent County		0

(continued)

Camping as accommodation:(5)	
- Tourists and excursionists parties:	38.0 %
- Kent visitor parties (N.B. non-resident):	49.0 %

---

(1) The number of visitors was not available. Considering that the multiplication of parties number by average party size for market III results to a number of visitors much higher than the number of person-trips found in Touriscope 1986, Domestic travel we believe that it is better to extrapolate the number of visitors from the following ratio:

$$\text{Ratio} = \frac{\text{number of person-trips (market area III) (Touriscope 1986, Domestic Travel)}}{\text{number of tourists and excursionists parties (market area III) (1983 N.B. exit survey)}}$$

$$= \frac{1\ 328\ 360}{1\ 096\ 062} = 1.21$$

Thus, 90 918 (number of tourists and excursionists parties) x 1.21 = 110 010 visitors.

(2)(4) Source: 1983 New Brunswick Exit Survey, May 15th to October 31th.

(3) 25 709 (Kent visitor parties, N.B. non-residents) x 1.21 = 31 108 visitors.

(5) Categories are not mutually exclusive.

PROFILE OF NEW BRUNSWICK NON-RESIDENT TOURISTS AND EXCURSIONISTS (MARKET III)

Total number of person-trips	1 328 360(1)
Number of tourists and excursionists parties	1 096 062

Activities interested in:(2)

- beach/swimming	59.4 %
- fishing	44.5 %
- hiking	31.4 %

Origin:

- U.S.A. and other countries	38.5 %
- Atlantic	22.5 %
- Quebec	20.6 %
- Ontario	15.3 %
- Other Canada	3.1 %

Camping as accommodation: 18,0 %

---

(1) 44 % of trips to New Brunswick are accounted for by N.B. non-residents.
Total person-trips within New Brunswick = 3 019 000
44 % x 3 019 000 = 1 328 360 person-trips

Source: Touriscope 1986, Domestic Travel.

(2) Categories are not mutually exclusive.

Source: 1983 New Brunswick Exit Survey, May 15th to October 31th.

PROFILE OF QUEBEC TOURISTS TRAVELLING OUTSIDE QUEBEC

Quebec population	6 532 500(1) residents

Person-trips outside Quebec:

- total person-trips	2 667 000(2)
- total pleasure-trips	751 000(2)
- person-trips to Maritimes	293 000(2)
- person-trips to New-Brunswick	179 000(3)

Tourism outside Quebec, by quarter (person-trips)(4):

- quarter I (January to March)	20.6 %
- quarter II (April to June)	22.2 %
- quarter III (July to September)	41.9 %
- quarter IV (October to December)	15.3 %

Main activities participated in during trips(5):

- shopping	17.4 %
- visit of relatives and friends	15.2 %
- sightseeing	14.9 %
- swimming/bathing	9.2 %
- night life	8.5 %
- outdoors	8.0 %
- visit of sites	6.8 %
- attendance of cultural events	4.1 %
- visit of National Park	3.4 %
- other nautical and aquatic sports	2.8 %

(continued)

- local festivals	2.8 %
- attendance of sports activities	2.1 %
- hunting and fishing	1.1 %
- other	3.7 %
Camping as accommodation(6):	16.6 %

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(1)(2)(6) Touriscope 1988, Le Tourisme au Canada.

(3) Statistique Canada, 1986 - Touriscope. Voyages intérieurs. Canadiens voyageant au Canada.

(4)(5) . Les voyages de plus de 24 heures des québécois au Québec et à l'extérieur du Québec en 1984.
. Categories are mutually exclusive.

PROFILE OF ONTARIO TOURISTS TRAVELLING OUTSIDE ONTARIO

Ontario population 9 430 830(1) residents

Person-pleasure trips (outside Ontario, 1986) 1 500 000(2)

Person-trips to New Brunswick 119 000(3)

Kind of trips (1986)(4):

- scenic tours (sightseeing)	35.0 %
- big cities	32.0 %
- resort	18.0 %
- outdoors trips	15.0 %

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(1) Maclean Hunter Research Bureau; September/October, 1988.

(2)(4) Enquête auprès des touristes d'agrément de l'état de New York, du Massachusetts et de l'Ontario, été 1987. Tourisme analyse et développement.

(3) Ministère du Tourisme, Nouveau-Brunswick.

PROFILE OF AMERICAN TOURISTS TRAVELLING IN CANADA

Population (over 16 years old)	178 904 110(1)

Person-trips in Canada:

- total person-trips	38 200 000(2)
- total person-pleasure trips	5 575 000(3)
- total person-trips to New Brunswick	2 485 848(4)
- total person-pleasure trips to New Brunswick	362 934(5)
- total person-pleasure trips taken by North-East States Residents	133 560(6)

Type of pleasure trips(7):

- scenic tours (sightseeing)	29.0 %
- outdoors trips	19.0 %
- big cities	12.0 %
- resort	4.0 %
- other	36.0 %

Origin of pleasure trips tourists(8):

	%
- middle Atlantic	28.9
- East North Central	25.1
- Pacific	14.2

(continued)

	%
- New England	11.7
- West North Central	8.4
- South Atlantic	4.8
- West South Central	3.4
- Mountain	2.0
- East South Central	1.5
	100.0 %

Travel intentions to Canada (next 2 years - October 1985 to September 1987)(9):

- any type of trip	42 millions Americans
. sightseeing in Canada:	12.7 millions Americans
- Maritimes:	1 million Americans
. outdoors in Canada:	9.8 millions Americans
- Maritimes:	N.A.
. resort in Canada:	9.0 millions Americans
- Maritimes:	0.4 million Americans

Canadian regions preferred by American tourists(10)

- Pacific coast	35.0 %
- Quebec	21.0 %

(continued)

- Ontario	20.0 %
- Mountain	15.0 %
- Maritimes	9.0 %

Tourism in Canada, by quarter (person-trips)(11):

- quarter I (January to March)	14.0 %
- quarter II (April to June)	25.8 %
- quarter III (July to September)	41.9 %
- quarter IV (October to December)	18.3 %

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(1) Le marché américain des voyages d'agrément (1987), Ministère du tourisme, gouvernement du Québec.

(2)(7)(8)(11) Touriscope 1988, Le tourisme au Canada, Statistic Canada.

(3)(9)(10) Le marché américain des voyages d'agrément, Longwoods Research Group inc., 1986, Tourism Canada.

(4) Voyages internationaux, n° 66-201 au catalogue.

(5)

$$\frac{\text{Total person-pleasure trips to Canada}}{\text{Total person-trips to Canada}} = \frac{5\ 575\ 000}{38\ 200\ 000} = 14.6\ \%$$

14.6 % x 2 485 848 person-trips to N.B. = 362 934 person-pleasure trips to New Brunswick

(6)

. Percentage of total number person-trips in Canada taken by North-East States (East North Central, New England) is 36.8 % (source: Le marché américain des voyages d'agrément, Longwoods Research Group inc., 1986, Tourism Canada).

. 36.8 % x 362 934 person-pleasure trips to N.B. = 133 560 person-pleasure trips taken by residents of North-East States.

PROFILE OF ATLANTIC (OTHER THAN NEW BRUNSWICK) TOURISTS TRAVELLING IN CANADA

Atlantic population (P.E.I., Nova Scotia, Newfoundland)	1 580 700(1)

Interprovincial person-trips(2): 982 000 person-trips

Person-trips to New Brunswick(3):

- Prince Edward Island	70 000 person-trips
- Newfoundland	10 000 person-trips
- Nova Scotia	253 000 person-trips

Main activities participated in during trips(4):

- visiting friends/relatives	37.3 %
- shopping	26.4 %
- sightseeing	14.8 %
- nightlife/recreational activities	9.5 %
- outdoors/others	12.0 %

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(1) Maclean Hunter Research Bureau; September-October, 1988.

(2) Touriscope 1986, Domestic Travel

(3)(4) Touriscope 1988, Le Tourisme au Canada, Statistique Canada.

PROFILE OF OVERSEAS TOURISTS TRAVELLING IN CANADA

Total number of visitors to Canada:	2 050 000(1)
Total number of person-trips to New Brunswick	5 891(2)

Origin(3):

- U.K.	21.0 %
- West Germany	11.2 %
- Japan	11.2 %
- France	7.4 %
- Australia	4.0 %
- Italy	3.8 %
- Netherlands	3.6 %
- South America	3.4 %
- Hong Kong	3.0 %
- Mexico	2.2 %
- Other	29.2 %

Tourism in Canada, by quarter (person-trips)(4):

- quarter I	(January to March)	9.2 %
- quarter II	(April to June)	27.3 %
- quarter III	(July to September)	47.8 %
- quarter IV	(October to December)	15.7 %

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(1)(3) Tourism Canada.

(2) Voyages internationaux, n° 66-201 au catalogue.

(4) Touriscope 1988, Le tourisme au Canada, Statistic Canada.

PROFILE OF NEW BRUNSWICK RESIDENTS TRAVELLING WITHIN NEW BRUNSWICK

New Brunswick population	731 000(1) residents
Total number of person-trips within N.B.	1 687 000
Activities participated in(2):	
- visiting friends and relatives	29.3 %
- shopping	21.0 %
- sightseeing/touring	6.3 %
- sports/outdoor activities	5.7 %
Period of the travel:	
- weekend only	52.4 %
- during the week	46.5 %
Tourism region of destination:	
- St-John River	40.3 %
- Acadian Shore South (KNP)	21.8 %
- Fundy	19.4 %
- Acadian Shore North	7.1 %

(1) Source: Canadian Markets 1986. The Financial Post Information Service, 61st edition.

(2) Source: New Brunswick Travel Data, 1984.

4.3 CURRENT CAPTURE OF POTENTIAL MARKET

Current capture is defined as the current level of visit divided by potential market. Current capture is thus presented as a percentage and can be seen as market share or market penetration.

Table 4.3.1 presents for each market the current level of visit, the potential of the global market and the current capture of the market. In the following pages the results are explained in more detail.

TABLE 4.3.1

MARKETS	CURRENT LEVEL OF VISIT(1)	POTENTIAL OF GLOBAL MARKET	CURRENT CAPTURE (% OF PERSON-TRIPS)	POTENTIAL OF SPECIFIC MARKET N.B. VISITORS	CURRENT CAPTURE (% OF PERSON-TRIPS)
All markets	129 528 person-trips	9 108 300 person-trips	1.4 %	2 544 151	5.1 %
- summer season	82 763				
- winter season	16 839				
- shoulder seasons	29 926				
Local market	38 860 person-trips	86 700 person-trips	44.8 %	86 700 person-trips	44.8 %
- summer season	25 574				
- winter season	13 286				
Market area II (route 11)					
- total	N.A.	110 010 visitors	N.A.	110 010 visitors	N.A.
. summer season	N.A.				
. winter and shoulder seasons	N.A.				
- including Kent visitors (N.B. non residents)	N.A.	(31 108 visitors)	N.A.	(31 108 visitors)	N.A.
Market area III (outside N.B.)					
- Global	32 876 person-trips	7 334 600 person-trips	0.4 %	770 451 person-trips	4.3 %
. summer season	32 691				
. winter season	185				
- Quebec (summer)	16 387 person-trips	751 000 person-pleasure trips outside Quebec	2.2 %	179 000 person-trips to New Brunswick	9.2 %
- Ontario (summer)	6 373 person-trips	1 500 000 person-pleasure trips outside Ontario	0.4 %	119 000 person-trips to New Brunswick	5.4 %
- USA (North East) and other countries (summer)	5 049 person-trips	U.S.A. (N.-E.) 2 051 600 Person-pleasure trips in Canada Overseas 2 050 000 person-trip to Canada	0.1 %	133 560 person-trips 5 891	3.6 %
- Atlantic (other than New Brunswick)	4 138 person-trips	982 000 inter. person-trips	0.4 %	333 000 person-trips to New Brunswick	1.2 %
Market IV (N.B. residents)	27 866 person-trips	1 687 000 person-trips in New Brunswick	1.7 %	1 687 000 person-trips in New Brunswick	1.7 %
summer season	24 498				
winter season	3 368				

Note (1): We assume that a visit equals a person-trip.
Note (2): Market area II is not included in further computation since it is a part of market area I, III and IV.

DETAILED RESULTS FOR CURRENT LEVEL OF VISIT

ALL MARKETS

- Total number of visits in 1988 = 129 528 visits

  . summer season (June, July, August) = 82 763 visits
  . winter season (January, February, March) = 16 839 visits
  . shoulder seasons (other months) = 29 926 visits

(Source: KNP document, 1988).

LOCAL MARKET

- According to the 1988 summer survey (July 8th to September 5th), respectively 26.6 % and 4.3 % of summer visitor parties come from Kent county and Northumberland county. Indeed, we can assume that 30.9 % (25 574) of total summer person-trips (82 763) are done by local visitors (from Kent and Northumberland counties).

- Winter visitor parties come from closer areas than summer visitor parties. According to the 1986 winter survey (February 3rd to March 9th), 78.9 % of winter visitor parties come from Kent County. We can assume that 78.9 % (13 286) of total winter person-trips (16 839) are taken by local visitors.

MARKET AREA II (ROUTE 11)

- Given the available data (tourism N.B., 1983 Automobile Exit Survey, May 15th to October 31st) and the difficulty in finding a comparison basis between them, it is almost impossible to evaluate the current level of visit for this market.

- However, it is essential to consider that a part of these tourists and excursionists is probably included in the "current level of visit of whole markets" given that a part of them pass through highway 11 to go to the park.

MARKET AREA III (OUTSIDE N.B.)

- According to the 1988 summer survey (July 8th to September 5th), 39.5 % of summer visitor parties come from outside New Brunswick. Especially, respectively 19.8 %, 7.7 %, 6.1 % and 5.0 % of summer visitor parties are from Quebec, Ontario, U.S.A. and other countries and Atlantic (other than New Brunswick). We can assume that these percentages are applicable to the number of visits to evaluate the current level of visit for the global market and each sub-market:

  . Global market = 82 763 visits x 39.5 % = 32 691 person-trips;
  . Quebec = 82 763 visits x 19.8 % = 16 387 person-trips;
  . Ontario = 82 763 visits x 7.7 % = 6 373 person-trips;
  . U.S.A. and other countries = 82 763 visits x 6.1 % = 5 049 person-trips;
  . Atlantic (other than New Brunswick) = 82 763 visits x 5.0 % = 4 138 person-trips.

- From the 1986 winter survey (February 3rd to March 9th), we know that only 1.1 % of winter visitor parties come from outside New Brunswick. Applying this percentage to the total number of winter visits leads to 185 winter person-trips.

MARKET AREA IV (N.B. RESIDENTS)

- From the 1988 summer survey (July 8th to September 5th) 60.5 % of summer visitor parties come from New Brunswick. If we exclude Kent (26.6 %) and Northumberland (4.3 %) counties the current level of visit for market area IV can be estimated:

  82 763 x 29.6 % = 24 498 person-trips

- From the 1986 winter survey (February 3th to March 9th), we know that 98.9 % of winter visitor parties come from New Brunswick and 20.0 % are parties from Westmorland and other New Brunswick. Thus,

  16 839 (total winter visits) x 20.0 % = 3 368 person-trips

N.B. - The total number of summer person-trips of each market does not add to the total number of summer visits (whole market) because 0.9 % are accounted for by other Canada and these markets are not considered.

- The total number of person-trips of each market does not add to the total number of visits (whole market) because it was impossible to evaluate the current level of visit of each market during shoulder seasons.

4.4 ASSESSMENT OF MARKET SITUATION

Comparing the current capture of Kouchibouguac National Park for each market indicates very different degrees of market share. The local market share is very high with 44.8 %. Within market area III, KNP capture of the Quebec market is the second best with 9.2 %. U.S.A. and other Atlantic are showing the lowest capture with 3.6 % and 1.2 % respectively. As far as market area IV is concerned, KNP market share is 1.7 % which is lower than the capture of the market as a whole (5.1 %).

KNP seems to attain a very high local market penetration with a very low attractive power outside New Brunswick. However, the province of Quebec is an exception with relatively high degree of market capture. As indicated in table 4.1.2, Quebecers are attracted by beachwalk, sunbathing and swimming (to the same extent than other visitors), but their distinctive activities are: Nature study and hiking. In addition, despite being a more distant market than market area IV (New Brunswick residents) the province of Quebec may be more attracted by KNP for cultural reasons (a predominently french culture). A strong word of mouth phenomenon may also be at work with the resulting higher level of market capture.

As indicated in table 4.4.1, relative levels of visit to KNP are computed by origin and adjusted for comparison with available percentages for market area II and market area III. Comparing percentages (adjusted for New Brunswick) for market area I with percentages for market area II (passing through parties) indicates that Quebec visitors are over represented (50 % vs 36.2 %) whereas Ontario and U.S.A. are underrepresented (19.52 % vs

25 % and 15.38 % vs 19.8 %). These trends are confirmed for market area III with the additional indication of an under representation of Other Atlantic visitors (12.75 % vs 22.5 %).

The market strength of KNP is therefore concentrated in the local and Quebec markets. As regards markets outside New Brunswick, other Atlantic, Ontario and the U.S.A. are relatively under represented in KNP current level of visit.

Moreover analysis in part A of the study (table 3.3.2, p. 63 indicate that 91.8 % of the visitors are visiting the park to use the beach and outdoor recreational activities, especially in the local and regional market.

This indicates that KNP is not maximizing its central mission, as a national park, but playing more the role of a regional recreational park.

In our view this is due not to the park itself which should be rated exceptionaly well on product and services offered, but due to a lack of signing on the main highways of New Brunswick especially compared to Fundy and to a low level of awareness of its existence and nature among residents of and visitors to New Brunswick.

TABLE 4.4.1

SUMMARY OF KOUCHIGOUBUAC

NATIONAL PARK RELATIVE LEVELS OF VISIT BY ORIGIN

ORIGIN	MARKET AREA I			MARKET AREA II		MARKET AREA III
	Current level of visit (Visitor survey 1988)			Passing through parties (PTP) and Kent parties (NB Exit Survey 1983)		Non-Resident Tourists and Excursionists (NB Exit Survey (1983)
	Overall	Adjusted for NB	Adjusted for Kent	PTP	KP	
Kent county	26.6%	NA	NA	NA	NA	NA
Northumberland	4.3%	NA	5.8%	NA	1.2%	NA
Westmorland	8.7%	NA	12.0%	NA	4.1%	NA
Other New Brunswick	20.9%	NA	28.6%	NA	20.5%	NA
Other Atlantic	5.0%	12.75%	6.9%	12.6%	10.6%	22.5%
Québec	19.8%	50.0%	27.7%	36.2%	34.8%	20.6%
Ontario	7.7%	19.52%	10.5%	25.0%	14.6%	15.3%
Other Canada	0.9%	2.28%	1.2%	6.2%	2.4%	3.1%
U.S.A.	6.1%	15.38%	8.3%	19.8%	11.8%	38.5%

NA: Non applicable

Adjusted for N.B.: except N.B. parties

Adjusted for Kent: except Kent parties

4.5 TARGET MARKET PRIORITIES

4.5.1 Relation of target markets to objectives

The seven main objectives for Kouchibouguac National Park are:

- increase the awareness of the existence of the park;
- increase the awareness and understanding of its mission;
- enhance appreciation of park resources and use opportunities among current and potential park visitor markets;
- increase the number of visitors of the park, in particular during the shoulder season and in winter;
- increase use of park during the week;
- increase capture of potential markets;
- increase economic impact in the region of the park.

TABLE 4.5.1

TARGET MARKETS IN RELATION TO OBJECTIVES IMPORTANCE

TARGET MARKETS	MARKET AREA II ROUTE 11		MARKET AREA III					MARKET AREA IV	
OBJECTIVES	ROUTE 11	KENT COUNTY VISITOR PARTIES	ATLANTIC	QUEBEC	ONTARIO	U.S.A.	OTHER CANADA AND FOREIGN	KENT NORTHUMBERLAND	WESTMORLAND OTHER NEW BRUNSWICK
1. Increase awareness of the existence of the Park	High	Low	High	High	High	High	High	Low	Medium
2. Increase the awareness and understanding of mission	High	High	High	High	High	Medium	Medium	High	High
3. Enhance appreciation of park resources	Low	Low	High	Medium	Medium	Medium	Low	High	High
4. Increase number of visitors during shoulder seasons and winter	High	High	High	Low	Low	High	Low	High	High
5. Increase use during the week	Medium	High	Low	Low	Low	Low	Low	High	High
6. Increase capture of potential markets	High	Medium	High	Medium	High	Medium	Low	Medium	Medium
7. Increase economic impact in the region of the Park	Medium	Medium	High	Medium	Medium	High	Low	Medium	Medium

As indicated in table 4.5.1 each objective is associated with a specific degree of importance in relation to each target market. First of all, the awareness of the existence of the park is considered of very high importance for Route 11, since passing through visitors must know the existence of the park before they can decide to visit. As regards other objectives for Route 11, number 4 and number 6 are considered of high importance since passing traffic is easier to attract than more distant markets. However, since the composition of Route 11 traffic is varied as far as origin is concerned, specific objectives such as number 2 and 3 are of low importance but should be adapted to the origin of visitors passing on Route 11.

For market area III visitors, the objective of awareness of the existence of the park is high for all markets. The other objectives are suggested as important target markets for shoulder seasons.

For market area IV, Kent and Northumberland counties are prime targets for understanding of the park's mission, appreciation of park resources, shoulder seasons, winter visits and increasing use during the week. Importance of objectives for Westmorland and other New Brunswick are very similar with more emphasis on increasing the awareness of the existence of the park.

4.5.2 Recommended priorities for target markets

Given the objectives for Kouchibouguac National Park and the links between these objectives and the various potential markets priorities are recommended for each target market as presented in table 4.5.2.

TABLE 4.5.2

TARGET MARKET PRIORITIES SUMMARY

MARKETS	PRIORITY BY SEASON				OBJECTIVE
	SUMMER	SPRING	FALL	WINTER	
LOCAL	Z	High	High	High	. awareness and appreciation; . increase capture of potential; . off season activity.
ROUTE 11	High	Z	Z	Z	. awareness and appreciation; . visitor needs and expectations; . increase capture of potential; . economic impact.
NEW-BRUNSWICK RESIDENTS	Medium	High	High	High	. awareness and appreciation; . visitor needs and expectations; . increase capture of potential; . economic impact; . off season activity.
MARKETS OUTSIDE N.-B.: QUEBEC	High	Z	Medium	Z	. awareness and appreciation; . visitor needs and expectations; . increase capture of potential; . economic impact.
ONTARIO	High	Z	Medium	Z	. awareness and appreciation; . visitor needs and expectations; . increase capture of potential; . economic impact.
U.S.A.	Z	Z	High	Z	. awareness and appreciation; . visitor needs and expectations; . increase capture of potential; . economic impact; . off season activity.

Z: indicates a zero priority level.

MARKETING STRATEGY AND PLANNING CHAPTER 5

5.0 MARKETING STRATEGY AND PLANNING

Given the priorities set for the different target markets, a global development and marketing strategy is to be developed to reach the objectives of Kouchibouguac National Park managers.

Such a strategy includes decisions and actions regarding:

- the product of the park itself: equipment, activities and services;
- a pricing strategy and policy, for activities and camping;
- accessibility of the park and its different services;
- promotion and communication.

Although this strategy has to be developed as a whole, it is actually built from different substrategies and mixes required by the different target markets.

TARGETABLE PENETRATION RATES

In determining realistic penetration rates for each target market it is essential to consider their specific sensitivity to travel in Canada and more particularly in New Brunswick. They also should be interested in participating in activities offered by KNP. Indeed, this task requires taking account the location, the proximity to and the specific travelling behavior of each target market.

In market area III (outside New Brunswick) the Quebec market is definitely the more interesting market in terms of penetration. At the moment, the current capture of the Quebec market is the highest one in market area III. This fact is not surprising given its proximity to New Brunswick and the inclination of Quebecers to choose Canadian trip destinations.

The North East U.S.A. and Ontario markets seem to begin to be attracted by Maritimes destinations. Considering that many travel destinations, other than canadian, can be chosen by Americans, we believe that North East region residents are more likely to travel to New Brunswick.

To determine targetable penetration rates, we can refer to the Diffusion of Innovation theory(1) which assesses that the life cycle of a "new product", is subdivided into adoption stages in each of which we find consumers with distinctive behavior. Taking into account this theory we can associate the North East U.S.A. market and the Ontario market to "the innovators", a minority of consumers of potential markets, ready to adopt a new product or behavior very easily. In the same way, we can compare the Quebec and Atlantic markets to the "first majority" stage where a larger percentage of consumers of potential market are willing to adopt the product. Thus, it is realistic to assume that approximately 2.5 % of North East U.S.A. and Ontario potential markets can be attracted by KNP and that 10.0 % of the Quebec and Atlantic potential markets can be attracted by KNP.

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(1) E. Rogers and R. Shoemaker, The Diffusion of Innovation, JWS, 1978.

Considering the objective of maintaining the current growth rate of KNP (4 %), the expected total growth rate for the next four years is 17.0 % or 22 020 visits (17.0 % x 129 528 visits).

As presented in table 5.1, the total targetable penetration on the Quebec, Ontario, U.S.A. (North East) and Atlantic (other than New Brunswick) markets amounts to 57 214 person-trips, 2.6 times higher than the expected growth for the next four years.

As presented in table 5.2, the total targetable penetration on local, New Brunswick and outside New Brunswick markets amounts to 229 205 person-trips, 10.4 times higher than the expected growth for the next four years. Indeed, it appears that the KNP growth objective will be relatively easy to achieve with moderate marketing efforts, and that the current parking facilities capacity is sufficient.

TABLE 5.1

TARGETABLE PENETRATION RATES

TARGET MARKET	POTENTIAL MARKET	TARGETABLE PENETRATION RATES	TARGETABLE PENETRATION (PERSON-TRIPS) (Yearly level in four years from now)
QUEBEC	179 000 person-trips to New Brunswick	10 % (1)	17 900
ONTARIO	119 000 person-trips to New Brunswick	(1 %) 2.5 % (2)	(1 190) 2 975
U.S.A. (North East)	133 560 person-trips to New Brunswick	(1 %) 2.5 % (2)	(1 336) 3 339
ATLANTIC (OTHER THAN NEW BRUNSWICK)	333 000 person-trips to New Brunswick	10 % (1)	33 000
WHOLE MARKET (Outside New Brunswick)			57 214

(1) 10 % = innovators (2.5 %) and early adopters(7.5 %), given that in this market a stronger word of mouth is already at work.

(2) Innovators only.

TABLE 5.2

TARGET MARKET PRIORITIES SUMMARY

MARKETS	PRIORITY BY SEASON				POTENTIAL (YEARLY LEVEL IN FOUR YEARS FROM NOW)
	SUMMER	SPRING	FALL	WINTER	
LOCAL	Z	High	High	High	45 466 person-trips(1)
ROUTE 11	High	Z	Z	Z	8 251 person-trips(2)(3)
NEW-BRUNSWICK RESIDENTS	Medium	High	High	High	126 525 person-trips(4)
MARKETS OUT-SIDE N.-B.: QUEBEC	High	Z	Medium	Z	17 900 person-trips(5)
ONTARIO	High	Z	Medium	Z	2 975 person-trips(6)
U.S.A.	Z	Z	High	Z	3 339 person-trips(7)
ATLANTIC					33 000 person-trips
ATTAINABLE TOTAL					229 205 person-trips

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(1) 1.17 % (expected total growth rate - next 4 years) x 38 860 (current level of visit)
(2) 7.5 % (expected penetration rate) x 110 010 (potential of market area II, route 11)
(3) This market is not included because it is not a geographical market.
(4) 7.5 % (expected penetration rate) x 1 687 000 (potential of market area IV)
(5)(6)(7) see table (5.1).

The parking facilities are (see appendix I):

- 980 visitor parking spaces for cars;
- 31 parking spaces for motorcoaches, trailers and buses.

Considering that the average turn around rate for one parking car can be estimated at three (3) times per day and that the average number of visitors by car can be evaluated at 2.5, the visitor parking cars facilities capacity amounts to 7 350.

In the same way, considering that the average capacity of one motorcoach, trailer and bus can be estimated at 20 people and that the average turn around rate for one parking vehicle (other than car) can be estimated at 2 times per day (less than parking car turn around), the visitor parking facilities capacity amounts to 1 240.

Thus the total parking facilities capacity amounts to 8 590 visitors per day (7 350 + 1 240).

As presented in table 5.3, the KNP potential by season is:

- summer season = 162 263 person-trips
- winter season = 44 334 person-trips
- shoulder seasons = 22 613 person-trips

We assume that summer and winter seasons extend over three months each (90 days) and that shoulder seasons extend over six months (180 days). We also estimate KNP level of visits during one week-end day is twice the level of visits during one week day. Then the potential by season and by day is:

- summer season
  - weekday 1 578(1) person-trips (visits) per day
  - week-end day 3 156(2) person-trips (visits) per day

- winter season
  - weekday 457(3) person-trips (visits) per day
  - week-end day 914(4) person-trips (visits) per day

- shoulder seasons
  - weekday 134(5) person-trips (visits) per day
  - week-end day 268(6) person-trips (visits) per day

Thus, it appears that the highest level of visit per day that can be reached with moderate marketing efforts is 3 156 visits (week-ends during summer season) and that this level of visit is much less than the total parking facilities capacity per day (8 590).

---

(1) 1 578 x 5 (days per week) x 4 (weeks per month) x 3 (months) = 94 680.

(2) 3 156 x 2 (days per week-end) x 4 (weeks-ends per month) x 3 (month) = 75 744.

(3) 457 x 5 (days per week) x 4 (weeks per month) x 3 (months) = 27 420.

(4) 914 x 2 (days per week-end) x 4 (week-ends per month) x 3 (months) = 21 936.

(5) 134 x 5 (days per week) x 4 (week per month) x 6 (months) = 16 080.

(6) 268 x 2 (days per week-end) x 4 (week-ends per month) x 6 (months) = 12 864.

TABLE 5.3

POTENTIAL BY SEASON

MARKET SEASON	LOCAL	QUEBEC	ONTARIO	USA (N.E.)	ATLANTIC	OTHER NEW BRUNSWICK	TOTAL
Summer	(1) 29 917(65.8%)	(3) 7 500(41.9%)	(3) 1 012(34.0%)	(3) 1 399(41.9%)	(3) 11 220(34.0%)	(4) 111 215(87.9%)	162 263
Winter	(2) 15 549(34.2%)	(3) 3 974(22.2%)	(3) 714(24,0%)	(3) 862(25.8%)	(3) 7 925(24.0%)	(5) 15 310(12.1%)	44 334
Shoulder	N.A.	(3) 6 426(35.9%)	(3) 1 249(42.0%)	(3) 1 078(32.3%)	(3) 13 860(42.0%)	N.A.	22 613
TOTAL	45 466	17 900	2 975	3 339	33 000	126 525	229 205

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(1) 65.8 % = 25 574 ÷ 38 860 (summer current level of visit ÷ total current level of visit) (cf. Table 4.3.1).

(2) 34.2 % = 13 286 ÷ 38 860 (winter current level of visit ÷ total current level of visit) (cf. Table 4.3.1).

(3)
. cf. part 4.2.1 (potential of total market)
. summer corresponds to quarter III
. winter corresponds to quarter II

(4) 87.9 % = 24 498 ÷ 27 866 (summer current level of visit ÷ total current level of visit) (cf. Table 4.3.1).

(5) 12.1 % = 3 368 ÷ 27 866 (winter current level of visit ÷ total current level of visit) (cf. Table 4.3.1).

MASTER STRATEGY

The suggested master strategy for KNP is developped around the following elements, based on KNP's objectives, product situation and market profiles and potentials.

TARGET MARKETS

Priority 1: Current market

The current market has to be targeted first in order to increase the awareness of the mission and mandate of KNP, especially to local users who only see part of the product offered by the park, mainly the beach and recreational activities, and do not always grasp the whole extent of the mandate.

Priority 2: Local and regional

The local and regional market is to be given priority attention in spring, fall and winter in regards the use of the park in off season periods, because this is where the potential (in off season and especially in winter) is the greatest and easiest to promote. This is true also for week day activities.

Priority 3: Route 11

Route 11 must be given priority during the summer season in order to increase awareness of the existence of the park for tourists who already drive very close to the park. To some of them an explanation of the mission of KNP should be given.

Priority 4: New Brunswick residents

New Brunswick residents should be given priority in the spring, fall and winter seasons and at a somewhat lower level, in the summer season. They represent a market in which awareness of the existence of the park and its mission should be increased, and frequency of usage developed.

Priority 5: Quebec

Quebec should get a priority in the summer and the fall seasons, because it is a market in which a good level of capture is obtained, and in which it will be easy to gain points of market share. Hence it lies within the mission of the park.

Priority 6: Atlantic

Atlantic should get a priority during the spring, the summer and the fall seasons since it is a relatively close market within the mission of the park.

Priority 7: Ontario

Ontario should get a priority in the summer and the fall seasons, like Quebec it lies within the mission of the park. However, success because of distance and the absence of cultural proximity.

Priority 8: U.S.A.

U.S.A. should get priority in the fall season only, for economic impact reasons, and to maintain a level of activity in off season periods. This market presents a huge potential which is however more difficult to capture.

Positioning

The central positioning of KNP should be to present it as a national park whose object, and theme, is a "seashore", including a beach. Further, KNP main objective is the preservation and the interpretation of a natural seashore, in terms of seven different habitats.

The secondary positionings should include the presentation of KNP:

- as a beach of very natural essence, which is and has to remain unspoiled;
- as a play ground offered by nature for hiking, bicycling and canoeing or boating in a magnificent scenery;
- as a campground offering a unique experience of outdoor life.

In order to implement this strategy, a global marketing mix must be developed including:

- accessibility;
- promotion;
- pricing strategy and policy;
- product activities and services enhancement;

The potential of the market for KNP is substantial, hence the challenges to face lie in two tasks:

- first, making the park known, understood and accessible to target markets;
- second, managing the flow of visitors and possible conflicts of usage.

MARKETING MIX STRATEGY

Product

The main elements of the product to be worked on within the marketing strategy are as follows:

- trails and observation areas;
- activities;
- beaches;
- camping;
- Visitor Reception Center.

- The main element of the product for all markets is the seashore, its habitats and its beaches. It requires absolute priority of conservation.

- However one of the objectives is interpretation: trails, visitors reception center, and interpretation activities have to be maintained or enhanced. It could for example be envisioned, to develop more of an Interpretation Center, as compared to the Reception Center. This interpretation center could be developed on the visitor center or in another location, closer to the beach or dunes, in a more "marine" environment.

- Active recreation is also highly attractive for part of the market: it must be maintained. However as this market, which is more local, is already well served it should not be increased drastically.

- Beach use for sunbathing (which is different from beach use for nature enjoyment purposes) should be maintained, and could possibly be extended in summer peak season, by the addition of more accessible beach stretches. More beach usage could be used by KNP to increase awareness of the mission of the park.

- Camping could also be increased to offer more room for a big market potential: however two types of camping should be distinguished:

  . camping for nature's sake, which should be priorised;

  . camping for fun on the beach.

Decisions about camping facility increases should not be evaluated against market potential alone, but more with respect to management constraints, and impact on the park. Leaving the overflow of campers to local businesses will also increase economic impact of the park.

Accessibility

Accessibility is a key factor in the success of Kouchibouguac National Park marketing strategy, on two aspects:

. accessibility of the park itself, mainly from route 11;
. accessibility of sites and activities within the park.

- Accessibility of the park is to be improved through signs, information booth, information on product, gradual increase of the length of the visit, and opening hours of the Visitor Reception Center. The park itself is also very difficult to locate for a visitor, especially compared to Fundy, because there is an evident lack of signage on highways (1, 2, 15 especially) and even on the roads leading to it.

  In regards to parking, an overflow parking with a shuttle service could be envisioned, if the number of visitors should increase drastically in the summer season, because of increased awareness or accessibility.

- Traffic flow within the park is very good and access to sites is easy, and most of the time could probably handle more visitors.

Pricing strategy

A pricing strategy could be applied in a differential way to improve fluidity of campers during peak season, with fares increasing with length of stay.

Such a policy could be applied to only part of the campground, for the benefit of true nature lovers in comparison with beach campers.

Visibility

The visibility of Kouchibouguac National Park from route 11 should be improved in order to increase awareness of the existence of the park and of its mission for passer-bys, and, to accelerate word of mouth and possible choice of a Kouchibouguac National Park visit in the future.

Such visibility should be improved through signs, and possibly a prefab information booth or at least a light self explanatory exhibit directly on route 11, at a rest area.

Promotion

Kouchibouguac National Park lacks awareness and publicity in most markets, and even if this is less true in New-Brunswick, its mission and mandate is sometimes misunderstood.

Following actions should be undertaken in this perspective:

- Advertising, which consists of paid ads in magazines and papers, should be increased in local papers and in N.B. tourism literature. If the budget allows it, ads could be placed in Canadian travel magazines especially in Atlantic Canada, Quebec and Ontario.

- Public relations, which consists of non-paying editorials, articles or broadcasts should be triggered in:

  - Local media;
  - New Brunswick media;
  - Quebec media on travel and nature;
  - North American outdoors, nature, and photographic magazines and programs.

Such articles are obtained by invitations made to journalists and reporters of these media to visit the park. Contacts with associations of birdwatchers or other nature lovers, or photography clubs can also lead to articles in their magazines and newsletters.

- Direct marketing which consists of telephone calls (telemarketing) or direct mail, should be directed toward:

  - associations having an interest in nature in Quebec, Ontario, Atlantic Canada and U.S.A.;
  - tour operators for specific and general interest groups in Quebec, Ontario and U.S.A.;
  - pamphlet distribution in New-Brunswick information booths;
  - billboards on main highways in New-Brunswick.

- Other actions can be taken in partnership, for example:
  - increase Kouchibouguac National Park presence in Canadian Parks Service Communications;
  - increase Kouchibouguac National Park presence in New-Brunswick Tourism Department communications;
  - Associate with Fundy for common promotional activities.

TARGET MARKETS APPROACHES AND MARKETING MIXES

CHAPTER 6

6.0 TARGET MARKETS APPROACHES AND MARKETING MIXES

A specific marketing approach supported by a specific marketing mix has to be developped for each target market.

CURRENT VISITORS

Objectives:
- increase understanding of Kouchibouguac National Park Mission.

Actions:
- signs in parking lots explaining the mission;
- activities on beach and campground to stress mission.

LOCAL: KENT AND NORTHUMBERLAND

Objectives:
- increase understanding of Kouchibouguac National Park mission;
- increase weekdays and off season use.

Actions:
- public relations in local media;
- familiarization programs with local associations;
- education programs in schools.

ROUTE 11 MARKET:

Objectives:

- increase capture of the market;
- increase awareness and understanding of Kouchibouguac National Park;
- increase word of mouth on Kouchibouguac National Park.

Action:

- information booth and rest area on route 11;
- short familiarization programs or circuits;
- signs and billboards.

NEW-BRUNSWICK RESIDENT MARKET:

Objectives:

- increase awareness;
- increase capture of market;
- increase satisfaction of users.

Actions:

- public relations in New-Brunswick media;
- pamphlets in information booth on route 11;
- team up with Fundy for advertising in New Brunswick media;
- team up with New-Brunswick Department of tourism;
- direct-marketing toward associations and travel organizers.

NEW-BRUNSWICK NON RESIDENTS:

Objectives:

- increase capture of market;
- broaden season;
- increase length of stay in Kent County.

Actions:

- Public relations in specific interests media in Quebec, Atlantic, Canada, Ontario and U.S.A.;
- Brochures in information booths throughout New Brunswick;
- Billboards on main roads in New Brunswick;
- Team up with Fundy for promotional activities and mutual referral;
- Team up with New-Brunswick Department of Tourism;
- increase presence of Kouchibouguac National park in Canadian Park Service communications.

The following pages present a summary action plan for each market in order of priority.

TABLE 8.1

MARKET	CURRENT
ORIGIN	Tourists and day users already visiting the park.
MOTIVATIONS	See table 4.1.2 p. 18
LEVEL	Presently 130 000 visitors
OBJECTIVES	. Increase awareness of mission
JUSTIFICATION OF PRIORITY	. Part of the visitors do not know and understand the mission of the Park.
	ACTION PROGRAM
PRODUCT	Short term . No particular action requested Long term . Increase interpretation in VRC or develop real interpretation centre
PRICING	No particular action, except for differential pricing. Ex. camping, parking, day use, etc.
ACCESSIBILITY	No particular action
COMMUNICATION AND PROMOTION	Inform beach goers and campers of mission of park: pamphlets and direct.

TABLE 6.2

MARKET:	LOCAL
ORIGIN:	Kent and Northumberland Counties
MOTIVATIONS:	. Recreation (fishing-boating-canoeing-skiing); . Beach; . Sightseeing; . Camping.
GLOBAL POTENTIAL:	86 700 person-trips
TARGETABLE CAPTURE:	Present = 39 860 person-trips + 17 % = 6 606 Potential= 45 466
KOUCHIBOUGUAC NATIONAL PARK ATTRACTIVE POWER:	To this market Kouchibouguac National Park is and can be a playground with some daily or weekly use, almost all year round.
RELATION TO OBJECTIVES:	. The objectives of enhancing the understanding of the mission of national parks is of particular importance in this market; . The objective of increasing the usage of the park outside the peak season is also important.
JUSTIFICATION OF PRIORITY:	. Closeness; . All year round.

TABLE 6.2
(continued)

ACTION PROGRAM FOR LOCAL MARKET	
PRODUCT:	The product and services offered by KNP seem satisfactory. More access to beach and more campsites would benefit these people. But it is not a priority.
PRICING:	Differential pricing should be applied to campground in order to prevent too long stays in peak season.
ACCESSIBILITY:	No particular action to be taken.
COMMUNICATION AND PROMOTION:	Education through associations and schools, and special activities, in particular in local events, should be used to explain mission of park to this market. Promotional activities should attract residents to VRC, for specialy designed activities to explain mission of KNP.

TABLE 6.3

MARKET:	ROUTE 11
ORIGIN:	Quebec 36.2 % Ontario 25.0 % U.S.A. 19.8 %
CHARACTERISTICS:	Tourists 87.0 % Excursionnists 13.0 %
MOTIVATIONS:	. Sun bathing 68.5 % . Outdoors: - hiking 47.8 % - fishing 47.5 % - canoeing 29.7 %
GLOBAL POTENTIAL:	110 010 person-trips
TARGETABLE CAPTURE:	Present = N.A. Targetable penetration rate = 4.5 % Potential = 16 502 person-trips
KOUCHIBOUGUAC NATIONAL PARK ATTRACTIVE POWER:	. nature; . outdoor activities; . nature interpretation; . camping
RELATION TO OBJECTIVES:	. increase capture; . awareness of parks existence; . awareness of mission.
JUSTIFICATION OF PRIORITY:	. closeness; . variety; . correspondance to mission.

TABLE 6.3
(continued)

ACTION PROGRAM FOR ROUTE 11	
PRODUCT:	Again the product has not to be altered for this market. Short familiarization programs or circuits to facilitate short visits to get acquainted with the park. Short self guided visits to park highlights.
PRICING:	No particular action. Maintain possibility of short free visit to VRC.
ACCESSIBILITY:	Better signs on Route 11. Possibly light information booth with rest area could help.
COMMUNICATION AND PROMOTION:	Increase number of signs and billboards on Route 11. Poster and pamphlet in services along Route 11.

TABLE 6.4

MARKET:	NEW BRUNSWICK RESIDENTS
ORIGIN:	Province of New Brunswick
MOTIVATIONS:	. Visiting friends and relatives 29.3 % . Shopping 21.0 %
GLOBAL POTENTIAL:	1 687 000 person-trips
TARGETABLE CAPTURE:	Present= 27 866 Targetable penetration rate= 7.5 % (1) Potential = 126 525 person-trips
KOUCHIBOUGUAC NATIONAL PARK ATTRACTIVE POWER:	. outdoors; . beach; . nature.
RELATION TO OBJECTIVES:	. increase of awareness and understanding of mission; . enjoyment by Canadians; . increase of winter and off season.
JUSTIFICATION OF PRIORITY:	. relatively captive market; . off season potential.

(1) 7.5 % = 2.5 % innovators and 5 % early adopters which represents 2/3 of this latter category.

TABLE 6.4
(continued)

ACTION PROGRAM FOR NEW BRUNSWICK RESIDENTS	
PRODUCT:	No particular action to undertake. Except: - increasing campground; - interpretation facilities.
PRICING:	Differential camping rates in park season to narrow length of stay.
ACCESSIBILITY:	Parking Signs or billboards on Route 11, 15,2 and 1
COMMUNICATION AND PROMOTION:	Advertising in New Brunswick media; Public relations in New Brunswick media; Team up with Fundy for promotional activities; Team up with New Brunswick Department of Tourism; Direct marketing toward associations and travel organizers.

TABLE 6.5

MARKET:

OUTSIDE NEW BRUNSWICK/QUEBEC

ORIGIN: Province of Quebec, mainly Montreal and Quebec City

MOTIVATIONS:

. Camping	16.6 %
. Visit of relatives and friends	15.2 %
. Sightseeing	14.9 %
. Swimming	9.2 %
. Outdoors	8.0 %

GLOBAL POTENTIAL:

179 000 person-trips to New Brunswick

TARGETABLE CAPTURE:

Present = 16 387
Targetable penetration rate = 10 %
Potential = 17 900 person-trips

KOUCHIBOUGUAC NATIONAL PARK ATTRACTIVE POWER:

- beach;
- outdoors recreation;
- camping.

RELATION TO OBJECTIVES:

- increase awareness and understanding;
- increase usage;
- increase economic impact.

JUSTIFICATION OF PRIORITY:

- big potential;
- traditional market;
- within the scope of mission.

TABLE 6.5
(continued)

ACTION PROGRAM FOR QUEBEC MARKET	
PRODUCT:	No particular action except: - increase of campground facility; - increase interpretation.
PRICING:	Differential pricing for camping in summer.
ACCESSIBILITY:	Signs and billboards on route 11, 1, 2, 15. Brochures and posters in tourism information centers.
COMMUNICATION AND PROMOTION:	Brochures and posters in tourist information centers; Billboards on N.B. highways Advertising in Quebec media, especially tourism, photo and nature magazines Direct marketing to Quebec associations and tour operators.

TABLE 6.6

MARKET:	OUTSIDE NEW BRUNSWICK/ONTARIO
ORIGIN:	Ontario, mainly Metro Toronto, east and central Ontario
CHARACTERISTICS:	. average tourist
MOTIVATIONS:	. scenic-tours (sightseeing) 35 % . resort 18 % . outdoor trips 15 %
GLOBAL POTENTIAL:	119 000 person-trips to New Brunswick
TARGETABLE CAPTURE:	Present = 6 373 Targetable penetration rate = 2.5 % Potential = 2 975 person-trips
KOUCHIBOUGUAC NATIONAL PARK ATTRACTIVE POWER:	. nature; . interpretation.
RELATION TO OBJECTIVES:	. increase of awareness; . increase of usage; . increase economic impact.
JUSTIFICATION OF PRIORITY:	. big potential; . within mission.

TABLE 6.6
(continued)

ACTION PROGRAM FOR ONTARIO	
PRODUCT:	No particular action to be taken except increasing interpretation center.
PRICING:	No particular action except differential pricing to avoid longer stays on campground.
ACCESSIBILITY:	Signs on New Brunswick highways.
COMMUNICATION AND PROMOTION:	Pamphlets in information centers in New Brunswick; Billboards on main highways in New Brunswick; Public relations in Ontario tourism, nature and photo magazines; Direct marketing toward Ontario Tour Operators and Associations

TABLE 6.7

MARKET:	Outside New-Brunswick / U.S.A.
ORIGIN:	U.S.A. mainly north-east
CHARACTERISTICS:	Average tourist
MOTIVATIONS:	. scenic tours (sightseeing) 29.0 % . outdoor trips 19.0 % . resort 4.0 %
GLOBAL POTENTIAL:	133 560 person-trips to New Brunswick
TARGETABLE CAPTURE:	Present = 5 049 Targetable penetration rate = 2.5 % Potential = 3 339 person-trips
KOUCHIBOUGUAC NATIONAL PARK ATTRACTIVE POWER:	. Unspoiled seashore; . Nature interpretation; . Cultural heritage.
RELATION TO OBJECTIVES:	. Increase off season use and visit of the park; . Increase economic impact.
JUSTIFICATION OF PRIORITY:	. Big potential; . Off season travel behavior (fall).

TABLE 6.7
(continued)

ACTION PROGRAM FOR U.S.A.	
PRODUCT:	No changes to be made.
PRICING:	No specific actions.
ACCESSIBILITY:	Signs on New Brunswick highways.
COMMUNICATION AND PROMOTION:	Brochures and posters in New Brunswick tourism information centers; Public relations in U.S., in particular North Eastern in U.S. media and magazines specialized in tourism, nature and photography. Direct marketing toward North Eastern U.S. tour operators and associations.

TABLE 6.8

MARKET: Atlantic Canada (OTHER THAN NEW BRUNSWICK)

ORIGIN: P.E.I., Nova Scotia, New Foundland

CHARACTERISTICS: Average tourist

MOTIVATIONS:

. visiting friends/relatives	37.3 %
. shopping	26.4 %
. sightseeing	14.8 %
. outdoors/others	12.0 %
. nightlife/recr. activities	9.5 %

GLOBAL POTENTIAL: 333 000 person-trips to New Brunswick

TARGETABLE CAPTURE:
Present = N.A.
Targetable penetration rate = 10.0 %
Potential = 33 000 person-trips

KOUCHIBOUGUAC NATIONAL PARK ATTRACTIVE POWER:

- Increase of awareness and understand of mission;
- Enjoyment by Canadians;
- Increase of winter and off season.

RELATION TO OBJECTIVES:

- Increase off season use and visit of the park

JUSTIFICATION OF PRIORITY:

- Very close market;
- Off season potential.

TABLE 6.8
(continued)

ACTION PROGRAM FOR ATLANTIC CANADA	
PRODUCT:	No particular action to undertake Except: - increase of campground facility; - increase of interpretation.
PRICING:	Differential pricing for camping in summer.
ACCESSIBILITY:	Signs and billboards on route 11, 1, 2 and 15. Brochures and posters in tourism information centers.
COMMUNICATION AND PROMOTION:	Brochures and posters in tourist information centers; Billboards on N.B. highways. Advertising in Atlantic media, especially tourism, photo and nature magazine or sections. Direct marketing to Quebec associations and tour operators.

TABLE 6.9

MARKET:	WINTER MARKET
ORIGIN:	Local, New Brunswick, Atlantic Canada cross-county skiers.
CHARACTERISTICS:	See table 3.4.1 p. 77 of part A of the report.
MOTIVATIONS:	. enjoy scenic cross-county skiing
GLOBAL POTENTIAL:	242 510(1)
TARGETABLE CAPTURE:	Present = 16 839 Targetable penetration rate = 2.5 %(2) Potential = 6 063 person-trips
KOUCHIBOUGUAC NATIONAL PARK ATTRACTIVE POWER:	. Scenic trails; . Good snow; . Warm up and waxing hut.
RELATION TO OBJECTIVES:	. Off season use.
JUSTIFICATION OF PRIORITY:	. Off season use; . Closeness.

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(1) From figures in table 4.3.1, using proportions of winter current levels of visit applied to potential of specific market N.B. visitors.

(2) Early adopters account for 2.5 % according to the theory of diffusion of innovation.

TABLE 6.9
(continued)

ACTION PROGRAM FOR WINTER PROGRAM	
PRODUCT:	No particular action.
PRICING:	No particular action.
ACCESSIBILITY:	Signs on route 11, 1, 2 and 15. Brochures and posters in tourism information centers.
COMMUNICATION AND PROMOTION:	Direct marketing toward clubs and associations for group outgoings. Advertising in Atlantic papers ski media.

PARK OFFER APPENDIX I

PARK OFFER

This section presents an overview of the park offer:

- summer activities and services
- winter activities and services
- interpretation programs
- lodging facilities
- parking facilities

Appendix D, in a separate document, can be consulted for more detailed information on these items.

KOUCHIBOUGUAC NATIONAL PARK SUMMER ACTIVITIES AND SERVICES

- Reception: . Visitor Reception Center

- Interpretation: . Visitor Reception Center
    - exhibit
    - audio-visual shows
    - tourism literature
    - souvenirs

  . Activities
    - 7 evening programs (outdoor theatre)
    - 2 campfires with entertainment

- 6 family walking tour
- 4 special programs
- 4 puppet shows weekly (Kellys Beach)
- exhibit on Kellys Beach boardwalk (30 themes per summer)

. Self-guided activities
- 5 nature trails
- visitor Reception center exhibit

- Nature trails:

. Kellys Beach Boardwalk (Kellys Beach)
- 0.5 km
- interpretative signs, belvedere

. Beaver Trail (central area)
. 1.4 km

. Old Cedar Trail (central area)
- 1.0 km
. Pine Trail (central area)
- 0.8 km

. Tweedie (road 117)
- 1.2 km

. Bog trail (central area)
- 1.8 km
- interpretive sign, observation post

. Salt Marsh (between Kellys and Callenders)
- 0.7 km
- interpretive signs

- Hiking:

. Claire-Fontaine trail (Black River)
- 3.4 km

. Kouchibouguac River trail (south shore)
- 14 km
- belvedere

. Major Kollock creek trail (central sector)
- 11 km

Bicycling:

. 22.6 km bicycle trail system

. Ryans rental center
- 25 bicycles available

. Belvedere
- La Source
- Kellys Beach
- The Bog
- trails

. Accessible sites
- 6 warm-up shelters
- activities sites of La Source
- Ryans, Kellys and Callenders beaches
- South Kouchibouguac camping
- Information center

Picnic:

. Kelly Beach
- facilities
- canteen

Canoeing:
. Ryans rental center
- 15 canoes
- 6 launches
- 8 pedal boats
. disembarcation ramps (canoes)
- Major Kollock Creek
- Black River

Disembaracation ramps:
. Saint-Louis Cape Guay
. Loggiecraft Guay

Canoeing-camping:

. Richibucto dune

. North

. Sipu (back-country camping)

. Pointe à Maxime

Windsurfing: . Non encouraged activity

Sport fishing: . Allowed but non encouraged

KOUCHIBOUGUAC NATIONAL PARK WINTER ACTIVITIES AND SERVICES

- Cross-country skiing:
  - . 25 km groomed trails system
  - . 21 km for traditional cross-country skiing
  - . 9 km for cross-country free style skiing
  - . 6 warm-up shelters

    1- Pijeboogwek
    2- Patterson
    3- Middle Kouchibouguac
    4- South Kouchibouguac
    5- La Source
    6- Petit-Large

  - . one heated waxing chalet, Pijeboogwek shelter
  - . parking area, Pijeboogwek chalet
- Snow-shoeing:
  - . 5.2 km trail links Ryans to Callenders
- Toboggan:
  - . Patterson shelter
- Winter camping:
  - . Petit-Large back country camping
- Snowmobiling:
  - . on frozen rivers exclusively

INTERPRETATION PROGRAMS

The Visitor Reception Centre offers a program that shows the park themes and interpretive exhibits. There is a theatre with 70 seats where two audio-visual shows are available throughout the year.

The park offers a variety of personal services in French and English. The specialized programs are:

- evening programs (outdoor theatre - Ryans)
- puppet show (Kellys Beach)
- campfire (between Ryans and Kellys Beach)
- under the umbrella - boardwalk exhibit (Kellys Beach)
- family walking tours (various sites and habitats)
- special programs - parade
- special events - cross country competition - cross country marathon
- school programs - interpretive winter program for Kent county schools and other New Brunswick (9 weeks)

The auto-guided services and facilities are:

- nature trails with interpretive signs (Kellys Beach, Bog, Salt Marsh)

- intepretive signs at South Kouchibouguac camping

- four other nature trails without interpretive signs

LODGING FACILITIES

The lodging facilities offer of Kent county includes:

- motels
- bed and breakfast
- cabins
- campsites

The next table shows the distribution of lodging facilities (except camp sites) in the region of the park and in Kent county.

LODGING FACILITIES	REGION OF THE PARK		KENT COUNTY	
	ESTABLISHMENT	UNIT	ESTABLISHMENT	UNIT
Hotel	-	-	-	-
Motel	3 (2)	55 (48)	5 (3)	76 (58)
Cabin	3	17	5	28
Bed and breakfast	3	8	3	12
Total	9	80	15	116

( ): number of establishments and units opened throughout the year.

The number of bed and breakfast and cabins is large. They represent 66.7% of all establishments. However they offer a small reception capacity: an average of four units. It is interesting to note that these establishments are better distributed throughout the county than the motel units more concentrated in the periphery of the park.

Almost all camp sites are located in the periphery of the park (except one). Their total capacity amounts to 719 locations of which 641 are in the region of the park and 249 on the KNP.

LOCALITY	CAMPGROUND	LOCATION	LOCATION WITH ELECTRICITY
Pointe Sapin	1	35	-
Richibucto	2	117	59
Saint-Louis de Kent	2	240	121
Sub total	5	392	180
KNP	2	249	-
Total region of the park	7	641	180
Bouctouche	1	37	20
Rogersville [1]	1	41	41
Total Kent county	9	719	241

---

(1) located outside Kent county

PARKING FACILITIES

LOCATION	VISITOR PARKING CAR	MOTORCOACHES, TRAILERS AND BUSES
Les Pines	6	2
Le Castor	5	1
Salt Marsh	6	1
Ryans area	55	3
Bog Trail	9	2
South Kouch. Cpg'd (visitor)	34	
Adm./V.R.C. Complex	24	5
Pijeboogwek	74	
Kellys	364	12
La Source	38	
Tweedie	9	1
Fishing hole # 1	5	
Pankin	4	2
Major Kallock Parking	12	2
Covered bridge	4	
Côte à Fabien (visitor)	18	
Black River Fishing hole	8	
Claire Fontaine Trail	6	
Callanders	50	
Campsites	249	
TOTALS	980	31

PRIMARY DATA REQUIREMENTS AND SECONDARY DATA NEEDED TO IMPROVE KNP MARKET ANALYSIS AND MANAGEMENT STRATEGY RECOMMENDATIONS

APPENDIX II

APPENDIX II: PRIMARY DATA REQUIREMENTS AND SECONDARY DATA NEEDED TO IMPROVE KNP MARKET ANALYSIS AND MANAGEMENT STRATEGY RECOMMENDATIONS

PRIMARY DATA REQUIREMENTS

To improve KNP current market analysis the following data characteristics should be kept under control:

- Surveys of summer and winter visitors should have been conducted during the same year.

- Surveys during the shoulder seasons would be essential.

- Measurements should be consistent accross surveys, for example a mixture of parties, person-trips, individual visitors or individual visit makes it difficult to compute reliable global figures.

- A consistent formulation should be used for questions on activities. For example, interest in a specific outdoor activity is not the same as participation in that activity.

- Survey dates and sample should be such that statistical inference to the population is clearly possible over a specified period.

- Weighted data are useful to get an idea of global figures, but they can be very misleading as far as sample representativeness and statistical significance is concerned (see for exemple the profile of summer parties form "other Canada" in part A of the report p. 39).

- To ease data analysis and interpretation, a complete and a clear list of coding with variable labels and value labels should be provided with the survey questionnaire. For exemple, it is important to be able to clearly distinguish non responses (refusals, missing data, branching) from no opinions.

- Data should be provided in text (ASCII) files with separate text (ASCII) files of SPSS or SAS program codings (if available) . Text files are more versatiles for transfer to mainframe via modem and communication programs.

SECONDARY DATA NEEDED

To improve management recommendations, secondary data on potentials and market penetration should have the following characteristics:

- The more recent the data, the better.

- Consistent measurements with consistent question formulation and unit of analysis (for exemple person-trips).

- Comparable survey periods.

- Geographical market potential definitions that are clearly mutually exclusive and exhaustive.

- Coordinate secondary data presentation and prepare cross-tabulations in relation to primary data (for example, cross-tabulations of origin by activities is available for surveys but not readily accessible for secondary data).

- Prepare a table of how visitors from outside Canada are distributed in each Canadian provinces over the different seasons. These data are available to some extent in some provinces but figures are not very up-to-date and not distributed according to type of visit, activities and seasons.

Zins Beauchesne et Associés

Analyse et Planification Marketing

MARKET ANALYSIS
KOUCHIBOUGUAC
NATIONAL PARK

APPENDICES

CONTRACT NO: ARO 88.27
MARKET ANALYSIS

PRESENTED TO:

THE CANADIAN PARKS SERVICE
ATLANTIC REGIONAL OFFICE
SOCIO-ECONOMIC SECTION

BY:

ZINS BEAUCHESNE AND ASSOCIATES
990, DE BOURGOGNE
SUITE 101
STE-FOY (QUEBEC)
G1W 2L5

JULY 4 1989

MARKET ANALYSIS KOUCHIBOUGUAC NATIONAL PARK
APPENDICES

PREPARED FOR

THE CANADIAN PARKS SERVICE
ATLANTIC REGIONAL OFFICE
SOCIO-ECONOMIC SECTION

ZINS BEAUCHESNE AND ASSOCIATES

990, DE BOURGOGNE
SUITE 101
STE-FOY, QUEBEC
G1W 2L5
(418) 657-2200

2005, PEEL
SUITE 1100
MONTREAL
H3A 3B8
(514) 843-8825

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APPENDIX A

SUMMER MARKET DETAILED ANALYSIS

SEGMENTATION BY ORIGIN USING POSTAL CODES CHAPTER 1

1.0 SEGMENTATION BY ORIGIN USING POSTAL CODES

The segmentation of party visitors was performed using postal codes and zip codes (to identify U.S. origin). The procedure used Canada's Postal Code Directory 1988 from Canada Post Corporation and postal codes supplied by Kouchibouguac National Park officals. The following pages indicates the allocation of the first character of the postal code for Canada and the list supplied by the Park.

The specific allocation of origin used the first three characters of the postal code to identify visitors from Kent, Northumberland and Westmorland counties. Visitors from other New Brunswick, Atlantic (except New Brunswick), Quebec, Ontario, other Canada are identified with the first character of the postal code. Visitors for the United States are identified with the presence of a zip code. The following table indicates the allocation procedure that was used:

ALLOCATION OF POSTAL (ZIP) CODES

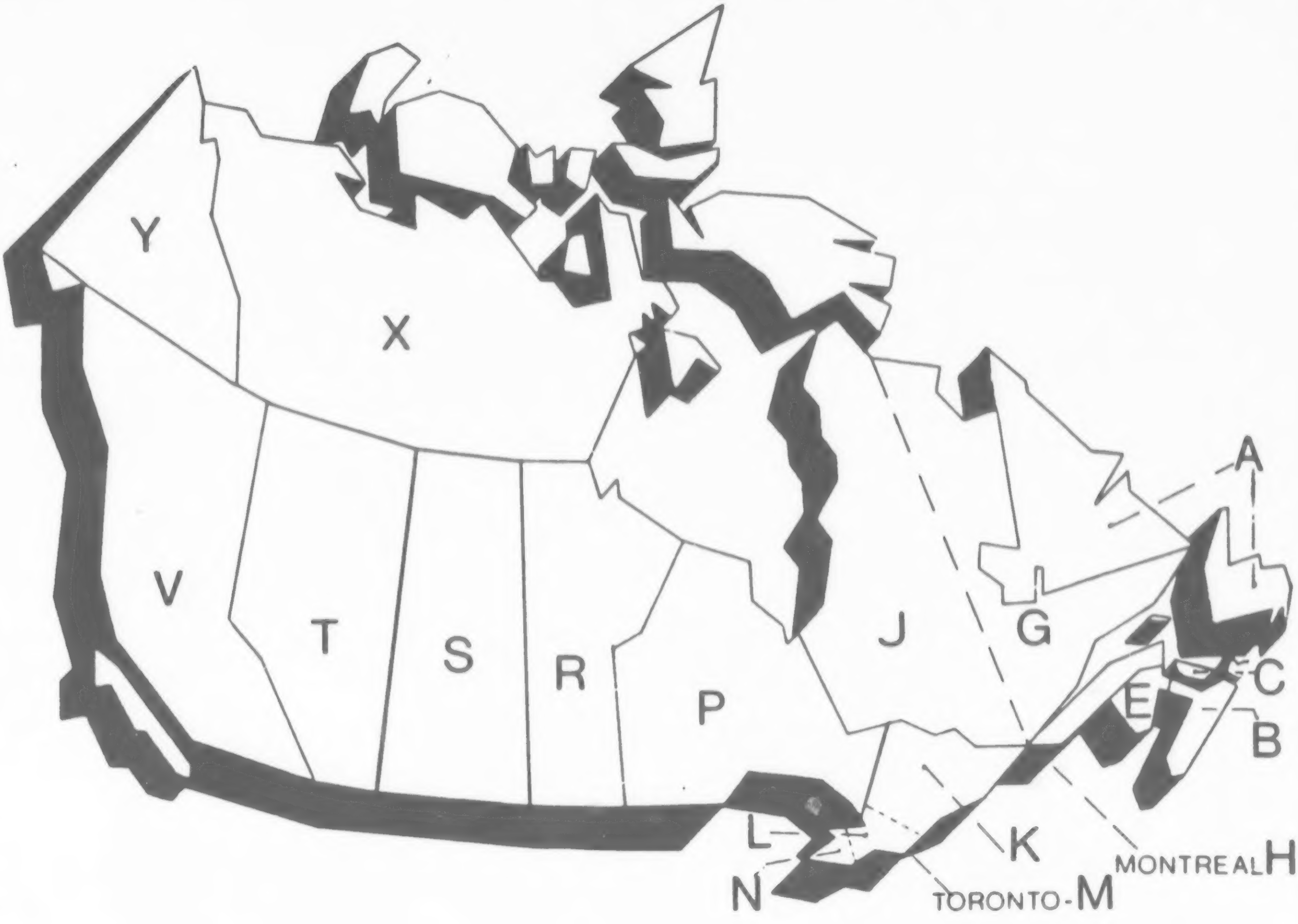
ORIGINS	POSTAL (ZIP) CODES
1. Kent	E0A
2. Northumberland	E1N, E1V
3. Westmorland	E1A, E1B, E1C, E1E, E1G
4. Other New Bruswick	Other E
5. Atlantic (except NB)	A,B,C
6. Québec	G,H,J
7. Ontario	K,L,M,N,P
8. Other Canada	R,S,T,V,X,Y
9. United States	Zip codes

The corresponding SAS coding is listed in appendice A of the present report. The procedure was applied to variable 10 of the visitor survey data file. Results of the origin of summer visitors is presented in the following pages with a pie shaped diagram.

Visitors from Kent account for 26.6% followed in decreasing order by: other New Brunswick (20.9%), Quebec (19.8%) Westmorland (8.7%), Ontario (7.7%), U.S.A. (6.1%), Atlantic except N.B. (5%), Northumberland (4.3%), other Canada (.9%).

Map of Canada
Showing allocation of the
first character of the Postal CODE

Carte du Canada
Indiquant comment est attribué
le premier caractère du CODE Postal



A	Newfoundland/Terre-Neuve
B	Nova Scotia/Nouvelle-Écosse
C	Prince Edward Island/Île-du-Prince-Édouard
E	New Brunswick/Nouveau-Brunswick
G	Quebec East/Est du Québec
H	Montreal Metropolitan/Montréal Métro
J	Quebec West/Ouest du Québec
K	Eastern Ontario/Est de l'Ontario
L	Central Ontario/Centre de l'Ontario
M	Toronto Metropolitan/Toronto Métro
N	Southwestern Ontario/ Sud-Ouest de l'Ontario
P	Northern Ontario/Nord de l'Ontario
R	Manitoba
S	Saskatchewan
T	Alberta
V	British Columbia/Colombie-Britannique
X	Northwest Territories/ Territoires du Nord-Ouest
Y	Yukon

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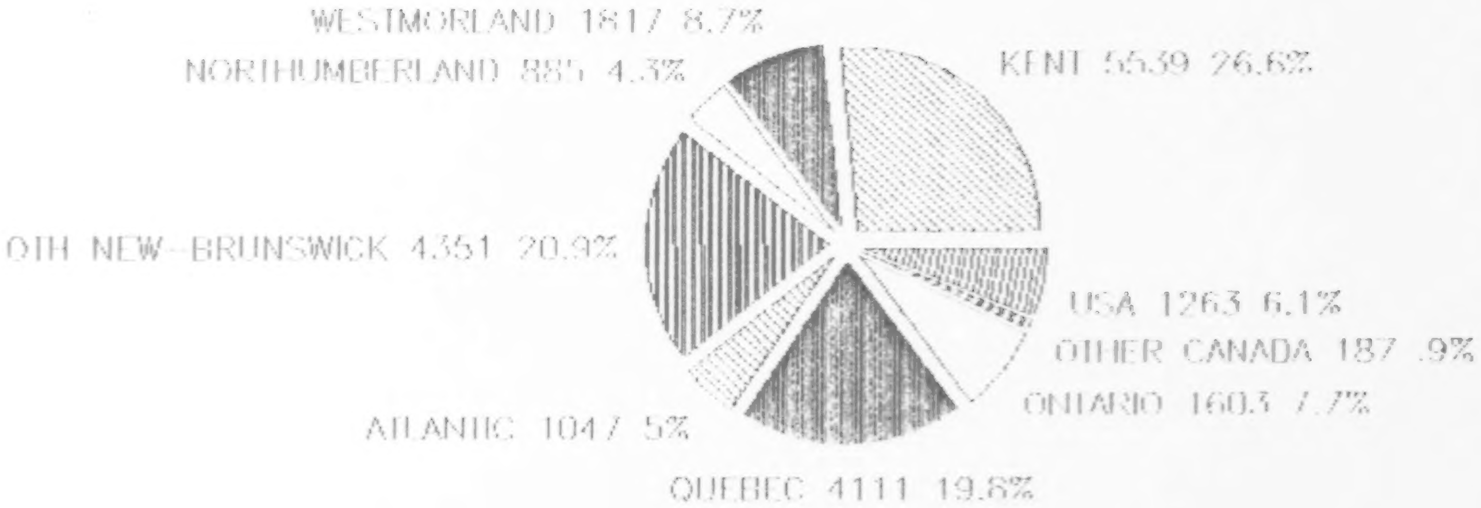
VILLAGES	CODE POSTAL
Rogersville	E0A 2T0
Acadieville	E0A 2T0
Acadie Siding	E0A 2T0
Kent Junction	E0A 2T0
Harcourt	E0A 1T0
Adamsville	E0A 1T0
Beersville	E0A 1T0
Coal Branch	E0A 1T0
Bass River	E0A 1C0
Ford Mills	E0A 1C0
Molus River	E0A 1C0
Smiths Corner	E0A 1C0
Rexton	E0A 2L0
Big Cove	E0A 2L0
Indian Island	E0A 2L0
South Branch	E0A 2L0
Bouctouche	E0A 1G0
Haut-Bouctouche	E0A 1G0
Pine Ridge	E0A 1G0
Saint-Thomas	E0A 1G0
Notre-Dame	E0A 2G0
Grande Digue	E0A 1S0
Cap-des-Caissie	E0A 1S0
Richibouctou-Village	E0A 2N0
Cap-Lumière	E0A 2N0
Saint-Antoine	E0A 2X0
Coates Mills	E0A 2X0
McKees Mills	E0A 2X0
Cocagne	E0A 1K0
Cormierville	E0A 1K0
Kouchibouguac	E0A 2A0
Fontaine	E0A 2A0
Pointe-Sapin	E0A 2A0
Richibouctou	E0A 2M0
Grande Aldouane	E0A 2M0
Kent Lake	E0A 2M0
Saint-Charles	E0A 2M0
Saint-Paul	E0A 3B0
Hébert	E0A 3B0
McLean Settlement	E0A 3B0
Ste-Anne de Kent	E0A 2V0
Saint-Edouard de Kent	E0A 2V0
Saint-Louis	E0A 2Z0
Saint-Ignace	E0A 2Z0
Ste-Marie de Kent	E0A 3A0
Saint-Norbert	E0A 3A0

ORIGIN OF SUMMER PARTIES
(N=21426)



SUMMER VISITORS SURVEY: SELECTED DESCRIPTIVE RESULTS

CHAPTER 2

2.0 SUMMER VISITORS SURVEY: SELECTED DESCRIPTIVE RESULTS

The first variable considered in this survey concerned the activities available in the park. The following table presents the percentages for the different activities in decreasing order of participation.

TABLE OF FREQUENCIES FOR SUMMER ACTIVITIES

ACTIVITIES	PARTICIPED	NOT INTERESTED	NO TIME	DID NOT KNOW ABOUT IT	POOR WEATHER
Beachwalk 1	87.0%	1.8%	9.6%	0.7%	0.9%
Sightseeing 2	75.1%	6.5%	15.3%	1.5%	1.0%
Sunbathing-swimming 3	75.0%	1.8%	11.6%		10.8%
Picknicking 4	65.2%	9.7%	20.3%	0.5%	2.0%
Interpretation trails 5	58.4%	5.7%	31.3%	1.4%	1.9%
Nature study6	53.5%	16.7%	25.9%	3.0%	0.6%
Hicking 7	47.0%	11.5%	39.0%	0.7%	1.0%
Birdwatching8	45.9%	24.3%	26.0%	3.2%	0.6%
Bicycling 9	38.0%	17.2%	37.3%		1.6%
Canoeing 10	21.4%	20.9%	49.8%	2.2%	3.2%
Boating 11	15.5%	28.7%	45.7%	4.8%	2.6%
Fishing 12	3.9%	45.3%	32.5%	14.5%	0.8%

Except fishing (activity with the lowest participation rate, 3.9%, the reasons why people do not participate in a specific activity are not related to a lack of awareness, but rather to a lack of time or of personal interest in it.

Out of twelve activities, six present a participation level above 50%. The first three activities: beachwalk, sightseeing and sunbathing-swimming are the most popular with at least three quarters of the visitors participating in them.

2.1 Classification of summer activities

These activities present some similarities and some were grouped together to form 4 classes of activities that may be used as strategic axis of development:

- Beach : including beachwalk and sunbathing-swimming.
- Family outing: including sightseeing, picknicking, hiking, and bicycling.
- Nature: including interpretation trails, nature study, and birdwatching.
- Boat-fishing: including boating, canoeing, fishing.

The decreasing order average participation rates of these 4 classes of activities, in are listed in the following table.

CLASSIFICATION OF SUMMER TYPE OF ACTIVITIES
IN DECREASING ORDER OF PARTICIPATION LEVEL

RANK	TYPE OF SUMMER ACTIVITIES	% OF PARTICIPATION*
1	Beach (1+3)	81.0%
2	Family outing (2+4+7+9)	56.3%
3	Nature (5+6+8)	52.6%
4	Boat-fishing (10+11+12)	13.6%

* The total percentage is above 100% because of participation in multiple activities.

2.2 Summer visitors satisfaction level

Beach activities are the most popular in the summer, instead of fishing or boating activities.

Programs, trails and services available in the park can also be analyzed in relation to the visitors satisfaction level.

CLASSIFICATION OF PROGRAMS AS REGARDS AVERAGE LEVEL OF SATISFACTION

(1= HIGHEST LEVEL 5 = LOWEST LEVEL)

RANK	PROGRAMS	% OF USERS	MEAN (level of satisfaction)	STANDARD DEVIATION
1	Family Outing	25.7%	1.50	0.93
2	VRC Exhibit	32.5%	1.61	0.91
3	Boardwalk Exhibits	50.1%	1.64	0.90
4	Special Event	4.4%	1.67	1.02
5	VRC	51.8%	1.68	1.01
6	VRC Audio-visual presentation	20.5%	1.71	1.14
7	Campfire	12.8%	1.75	1.21
8	Evening Program	14.7%	1.77	1.17
9	Puppet Show	13.0%	1.85	1.07

CLASSIFICATION OF THE TRAILS AND SERVICES AS REGARDS AVERAGE LEVEL OF SATISFACTION

RANK	PROGRAMS	% OF USERS	MEAN (level of satisfaction)	STANDARD DEVIATION
	Trails:			
1	Bog Trail	19.4%	1.47	0.91
2	Kelly's Trail	77.1%	1.49	1.03
3	Salt Marshes Trail	26.1%	1.66	0.91
4	Tweedie Trail	5.3%	1.76	0.95
5	Cedars Trail	7.4%	1.84	1.02
6	Pines Trail	15.1%	1.89	1.10
	Services:			
1	Canteen	61.6%	1.90	1.09
2	Restaurant	24.8%	1.93	1.13
3	Rental Centre	26.0%	2.02	1.25

There is no significant differences betwenn the means of satisfaction level. The large standard deviations does not allow us to rank programs, trails or services as regards their level of satisfaction. In general visitors are satisfied with programs or services available in the park.

2.3 Level of participation in programs, trails or services

However levels of participation are different according to programs, trails or services. Consequently it is possible to rank services in order of participation level.

CLASSIFICATION OF PARK'S TRAILS, SERVICES AND
USE AREAS IN DECREASING ORDER OF USAGE

RANK	TRAILS	% OF USERS
1	Kelly's trail	77.1%
2	Beaver trail	27.0%
3	Salt Marshes trail	26.1%
4	Bog trail	19.4%
5	Pines trail	15.1%
6	Cedar trail	7.4%
7	Tweedie trail	5.3%

RANK	SERVICES	% OF USERS
1	Canteen	61.6%
2	Rental Centre	26.0%
3	Restaurant	24.8%

RANK	DAY USE AREAS	% OF USERS
1	Kelly's beach	83.2%
2	Ryans	25.3%
3	Callanders beach	18.8%
4	La Source Picnic	13.7%
5	Loggiecroft wharf	5.7%

An interesting element should be noted: Kelly's beach turns out to be the most attractive place in the park. Another attractive place is the canteen, that visitors tend to use in a high proportion.

2.4 Time spent in day use areas

As regards day use areas it appears that Kelly's beach is not only the most popular place (83.2% of users) but also the place where people spent the longest time. These results are presented in the following table.

TIME SPENT IN DAY USE AREAS

		TIME SPENT			
DAY USE AREAS	% OF USERS	MORE THAN 3 HOURS	2 TO 3 HOURS	1 TO 2 HOURS	1 HOUR OR LESS
Kelly's Beach	83.2%	47.3%	16.8%	18.8%	15.8%
Ryans	25.3%	18.6%	12.8%	32.6%	36.0%
Callanders Beach	18.8%	16.3%	4.0%	26.8%	52.9%
La Source Picnic Area	13.7%	15.3%	17.4%	15.4%	51.9%
Loggiecraft Wharf	5.7%	23.2%	11.8%	13.1%	51.9%

2.5 Summer visitors need for information

Apart from activities, programs, trails, services and areas, other interesting factors deserve attention:

- Visitors needs for information
- Improvements suggested by visitors.

When people planned their vacation they usually ask friends or relatives for information whatever their geographical origin.

The principal sources of information are indicated in the following table.

CLASSIFICATION OF THE PRINCIPAL SOURCES OF INFORMATION, WHEN VISITORS PLANNED THEIR VACATION

RANK	PRINCIPAL SOURCES OF INFORMATION	% OF PARTIES *
1	Friends and/or relatives	58.7%
2	Tourist bureau	12.8%
3	Tourist guide	11.6%
4	Advertisement (news paper, T.V., radio)	5.8%
5	Newspaper or magazine article	2.9%
6	Travel agency	0.2%
	Other	8.0%

* Percentages have been adjusted to account for 9.6% of respondants saying they already came to the park and knew the park.

As they were in the park visitors first needed information about available activities or services in the park. That information seemed to be easy to obtain. However, as indicated in the following table, fewer people needed information about outside areas but this information was more difficult to obtain.

MESURE OF THE INFORMATION NEEDED CONCERNING THE PARK AND THE OUTSIDE AREAS

INFORMATION ITEMS	% OF PARTIES NEEDING INFORMATION	% OF PARTIES WHO FOUND IT DIFFICULT TO OBTAIN THIS INFORMATION
Concerning the park:		
- available	64.0%	10.0%
- fees	55.0%	4.6%
- campgrounds	52.7%	7.4%
- available services	51.0%	5.0%
Concerning the outside areas:		
- services (including accomodation)	27.3%	13.3%
- tourist attractions	27.0%	24.0%

Another source of information available in the park, the information bulletin on radio station, presented a low level of awereness:

67% of the visitor parties were not aware of the existence of this bulletin, whereas those who listen to it (11%) appreciated it and considered it usefull for their visit (in 91% of cases)

Visitors are also satisfied with road signs directing to the park and in the park (87% of visitor parties found the signage sufficient).

2.6 Improvements suggested by visitor parties

However some improvements were suggested by over half (55%) of the respondants) to enhance the quality of their stay in the park. The main facilities that should be improved are campground and campsites facilities and commercial activities (stores, etc.)

SUGGESTIONS OF SERVICES THAT
COULD ENHANCE THE QUALITY OF THE STAY IN THE PARK
N= 11800

KINDS OF IMPROVEMENTS	% OF MENTIONS
- Campground, campsite facilities	22.0%
- Commercial activities (stores, laundromat)	16.2%
- Park Publicity, Information	13.9%
- Transportation (trails, roads, signage) parking, shuttle service)	13.2%
- Recreational activities	10.7%
- Pleased with present activities	9.9%
- Park regulations, staff services, security	7.1%
- Beach facilities, lifeguard services	5.7%
No comment	1.3%
	100.0%

PERCENTAGES OF FIRST VISIT AS A FUNCTION OF PARTIES ORIGIN

ORIGINS	FIRST VISIT (8432)	NOT THE FIRST VISIT (12911)	
Kent (5539)	6.0%	94.0%	100%
Northumberland (885)	10.5%	89.5%	100%
Westmorland (1817)	15.4%	84.6%	100%
Other New Brunswick (4351)	36.4%	63.6%	100%
Atlantic (1047)	64.9%	35.1%	100%
Quebec (4111)	66.3%	33.7%	100%
Ontario (1603)	69.5%	30.5%	100%
U.S.A. (1863)	76.3%	23.7%	100%
Other Canada (187)	100.0%	0.0%	100%
All parties (21343)	39.5%	60.5%	100%

PERCENTAGES OF FIRST VISIT AS A FUNCTION OF ACTIVITIES PARTICIPATION

ACTIVITIES (NUMBER OF PARTIES WHO PARTICIPATED)	FIRST VISIT (8432)	NOT THE FIRST VISIT (12911)	
Birdwatching (7422)	42.9%	57.1%	100%
Hiking (7860)	42.6%	57.3%	100%
Interpretation trails (10177)	42.6%	57.3%	100%
Nature Study (9062)	41.8%	58.2%	100%
Sightseeing (13217)	40.6%	59.4%	100%
Beachwalk (17031)	39.3%	60.7%	100%
Swimming-sun-bathing (14311)	36.5%	63.5%	100%
Bicycling (6459)	36.4%	63.6%	100%
Picknicking (11786)	31.9%	68.1%	100%
Fishing (605)	31.6%	68.4%	100%
Canoeing (3418)	30.9%	69.1%	100%
Boating (2407)	23.9%	76.1%	100%

PERCENTAGES OF FIRST VISIT TO THE PARK AS A FUNCTION OF PARTY COMPSITION

PARTY COMPOSITION	FIRST VISIT (8432)	NOT THE FIRST VISIT (12911)	
Couple (7096)	47.5%	52.5%	100%
Group of friends (2286)	41.5%	58.5%	100%
Family with children (8866)	39.1%	60.9%	100%
Alone (1544)	21.6%	78.4%	100%
More than one family (1565)	20.2%	79.8%	100%

KNOWLEDGE OF THE PARK CONSERVATION MANDATE

9885 parties (46.3%) knew that the park has a conservation mandate to fulfill 11470 parties (53.7%) didn't know anything about that mandate.

Parties who were aware of the park mandate rate it as follos:

- Disagree of stronglee disagree with that mandate	0%
- Neigher agree or disagree	2.0%
- Agree with that mandate	41.0%
- Strongly agree with that mandate	57.0%

CLASSIFICATION OF PARTIES ACCORDING TO THEIR ORIGIN AS A FUNCTION OF THEIR KNOWLEDGE OF THE PARK CONSERVATION MANDATE.

ORIGINS	KNOW THE MANDATE (9885)	DO NOT KNOW THE MANDATE (11470)	
Quebec (4111)	63.4%	36.6%	100%
Northumberland (1885)	57.9%	42.1%	100%
Westmorland (1817)	53.8%	46.2%	100%
Kent (5539)	42.5%	57.5%	100%
Ontario (1603)	42.4%	57.6%	100%
Other New Brunswick (4351)	41.8%	58.2%	100%
Atlantic (1047)	40.1%	59.9%	100%
Other Canada (187)	33.3%	66.7%	100%
U.S.A. (1263)	28.8%	71.2%	100%
All parties (21355)	46.3%	53.7%	100%

THE MAIN REASONS FOR PARTIES TO VISIT THE PARK WERE:

	Number of parties	% parties
Beach	7182	34.1%
Camping	4865	23.1%
Sightseeing	3098	14.7%
Bicycling	1002	4.8%
Interpretive programs and special events	26	0.1%
Other reasons	4858	23.1%
	21031	100.0%

MAIN REASON FOR PARTIES TO VISIT THE PARK AS A FUNCTION OF ACTIVITIES PARTICIPATED

	REASONS ORIGIN	BEACH 7182	CAMPING 4865	SIGHTSEEING 3098	BICYCLING 1002	INTERPRETIVE PROGRAMS AND EVENTS 26	OTHER 4858
14311	Swimming-sunbathing	6201	3420	1286	551	26	2571
17031	Beachwalk	5769	4068	2592	633	26	3576
11786	Pickniking	3367	3213	1066	708	26	3167
13217	Sightseeing	3748	3232	2024	441	26	3562
7860	Hiking	1632	2433	1246	296	26	2008
6459	Bicycling	1116	1889	812	1002	26	1523
9062	Nature study	2266	2542	1377	469	26	2282
7422	Birdwatching	1805	2104	1112	359	26	1952
10177	Interpretation trails	2313	3307	1560	358	26	2429
2407	Boating	701	604	218	193	0	691
3418	Canoeing	973	961	401	238	0	781
605	Fishing	210	53	148	64	0	129

MAIN REASON FOR PARTIES TO VISIT THE PARK AS A FUNCTION OF ORIGIN

REASONS ORIGIN	BEACH 7182	CAMPING 4865	SIGHTSEEING 3098	BICYCLING 1002	INTERPRETIVE PROGRAMS AND EVENTS 26	OTHER 4858
Kent (5539)	1977	591	602	526	-	1668
Westmorland (1817)	513	419	326	233	-	289
Northumberland (885)	606	93	93	-	-	93
Other New Brunswick (4351)	1491	1258	559	47	-	950
Atlantic (1047)	236	418	131	26	26	184
Quebec (4111)	1344	1139	597	107	-	889
Ontario (1603)	516	435	353	27	-	245
Other Canada (187)	-	62	62	-	-	93
U.S.A. (1263)	364	317	255	36	-	255

MAIN REASON FOR PARTIES TO VISIT THE PARK AS A FUNCTION OF PARTY COMPOSITION

REASONS ORIGIN	BEACH 7182	CAMPING 4865	SIGHTSEEING 3098	BICYCLING 1002	INTERPRETIVE PROGRAMS AND EVENTS 26	OTHER 4858
Alone (1544)	874	186	71	129	-	284
Couple (7096)	1261	1996	1329	425	-	1846
Family + children (8866)	3658	2027	795	413	26	1864
More than 1 family (1565)	598	175	451	-	-	340
Group of friends (2286)	751	480	421	35	-	524

MAIN REASON FOR PARTIES TO VISIT THE PARK AS A FUNCTION OF THE NUMBER OF VISIT

REASONS ORIGIN	BEACH 7182	CAMPING 4865	SIGHTSEEING 3098	BICYCLING 1002	INTERPRETIVE PROGRAMS AND EVENTS 26	OTHER 4858
First visit (8432)	32.6%	44.2%	59.0%	5.5%	-	39.2%
Not the first visit (12911)	67.4%	55.8%	41.0%	94.5%	100.0%	60.8%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0

SEGMENTATION ANALYSIS BASED ON GEOGRAPHICAL ORIGIN OF SUMMER VISITORS

CHAPTER 3

3.0 SEGMENTATION ANALYSIS BASED ON GEOGRAPHICAL ORIGIN OF SUMMER PARTIES

As mentioned above, the origin of summer parties was subdivided into nine categories using postal (Zip) codes:

1. Kent county
2. Westmorland county
3. Northumberland county
4. Other New Brunswick
5. Atlantic (except New Brunswick)
6. Québec
7. Ontario
8. Other Canada
9. U.S.A.

Summer visitors are considered in relation to their origin and they represent a population of 21426 visitors (weighted figures). Then, origin of visitors is examined in relation to: summer activities, summer programs, day use areas and services. A segmentation of summer visitors is also suggested in relation to the park evaluation as a function of summer activities and party composition. Both crosstabulations and correspondence analyses are presented to examine _a priori_ market segmentation and to identify _a posteriori_ underlying market structure.

3.1 Crosstabulation of origin by summer activities (a priori) segmentation

First, origin of parties is crosstabulated with summer activities. Data presented in table 1 indicate that some activities are popular for all visitors such as sunbathing swimming and beachwalk. However some activities such as fishing, boating and canoeing are less popular. It is however difficult to detect any clear relationship between summer activities and origin. Further multivariate analysis of table 1 is performed to examine all row and column profiles of the table in a space of low dimensions. Correspondence analysis weighs the percentage of observations in each rows and columns totals to derive comparable profiles. Activity profiles that are similar will correspond to regions that are close together on the resulting graphical display.

3.2 Mapping of summer activities as a function of origin (a posteriori segmentation)

Figure 1 is the result of applying correspondence analysis to the data in table 1. The complete printed output leading to figure 1 is available in appendice D. Figure 1 is interpreted in the same manner as graphical displays presented in the previous report on the winter market profiles. Market segments are indicated by capital letters, the size of which is indicated in the legend provided at the bottom of the figure. Summer activities are indicated on the map within various proximities of market segments. The closer an activity to a segment, the more likely the participation of the segment into the activity. For example, visitors from Kent (KE) represent 26.6% of the market and are more likely to participate in canoeing, swimming-sunbathing and fishing. Visitors from Québec (QC) account for 19.8% and tend to participate more in nature study and birdwatching. Visitors from the U.S.A. (US) account for 6.1% of the market and they appear very similar to Québec visitors as far as participation in summer activities is concerned.

The horizontal and vertical axes are the underlying structural dimensions of the market and must be derived a posteriori with the examination of the relative position of the markets and the activities in the figure. The relative importance of the underlying dimensions is indicated by the weighted variance associated with each axis. In figure 1, the horizontal axis represents 41% of weighted variance and seems to represent activities more related to nature on the left and activities more related to fun and well being on the right. The vertical axis can be interpreted as a decreasing degree of sportiveness, more sportive activities being in the lower part of the figure and less sportive activities being in the upper part. The vertical axis accounts for 32% of weighted variance.

In addition to the relative distances between market segments and activities, their relative closeness to the centre of the figure indicates how typical the market or the activity is from the average. For example in figure 1, beachwalk swimming and sunbathing are far less typical. With respect to markets, Atlantic (except New Brunswick) (AT) is a much more typical market than Other Canada (OC).

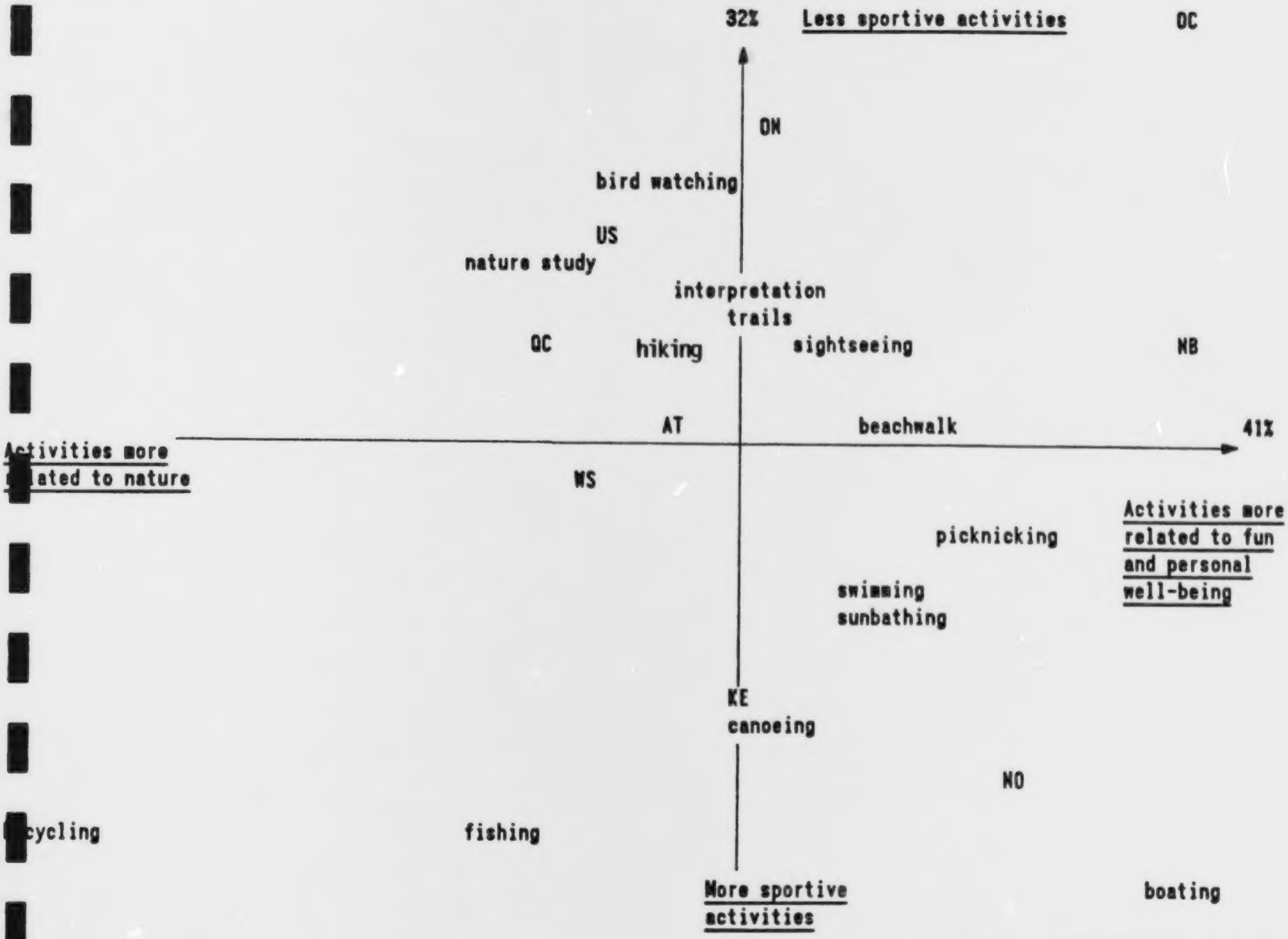
The market structure emerging from figure 1 is not easy to interpret. However, a tentative structure (to be confirmed with subsequent analysis) of two segments is suggested.

1. Parties from Kent (KE), Northumberland (NO) and other New Brunswick (NB)

Tend to prefer more sportive activities such as canoeing, boating and activities more related to fun and personal well being (beachwalk, swimming-sunbathing and picknicking).

FIGURE 1

MAPPING OF SUMMER PARTIES ACCORDING TO ORIGIN AS A FUNCTION OF ACTIVITIES IN THE PARK



LEGEND	% visitors
KE: Kent	26.6%
WS: Westmorland	8,7%
NO: Northumberland	4.3%
NB: Other New Brunswick	20.9%
AT: Atlantic	5.0%
QC: Quebec	19.8%
ON: Ontario	7.7%
OC: Other Canada	0.9%
US: U.S.A.	6.1%

TABLE 1

SUMMER ACTIVITIES AS A FUNCTION OF ORIGIN (WEIGHTED)

(N=21426)

ORIGIN ACTIVITIES	KENT	WEST-MORLAND	NORTHUMBERLAND	OTHER NEW BRUNSWICK	ATLANTIC	QUEBEC	ONTARIO	OTHER CANADA	U.S.A.
Sunbathing swimming	3849	978	745	2749	786	3087	1005	62	582
Beachwalk	4164	1351	699	3606	892	3407	1358	62	1045
Picknicking	3305	1212	373	2814	525	1779	734	62	753
Fishing	258	47	0	47	26	107	54	0	36
Interpretation trails	2310	792	186	2050	708	2304	761	62	764
Bicycling	1872	699	186	47	354	1486	163	0	400
Hicking	1744	746	140	1631	354	1940	516	0	545
Sightseeing	2789	1211	419	1703	851	2901	1087	62	800
Birdwatching	1608	652	93	1258	406	1779	734	62	717
Nature study	1966	792	140	1491	459	2660	706	0	618
Boating	924	186	93	652	157	249	81	0	36
Canoeing	1175	233	47	699	157	712	81	0	255

2. Visitor parties from Québec (QC), U.S.A. (US), Ontario (ON), Westmorland (WS) and Atlantic except New Brunswick (AT)

Are more likely to prefer activities related to nature (nature study, birdwatching) and less sportive activities (interpretation trails, hiking, sightseeing).

The remaining segment (other Canada) is very small (0.9%) and appears marginal as regards participation in summer activities (probably) as a result of a small number of observations).

3.3 Crosstabulation of origin by summer programs

Table 2 presents the weighted frequencies of summer programs participation as a function of origin. Examination of figures in table 2 reveal that some programs are less popular for all visitors (such as the puppet show). However it is difficult to detect clear relationship between programs and origin without a multivariate approach such as correspondence analysis.

3.4 Mapping of summer parties according to origin in relation to summer programs.

Figure 2 presents the graphical display associated with table 2. The interpretation of figure 2 is made in the same manner as figure 1. The closer a program to a market, the more likely is the market to participate in such a program. For example, Québec (QC) visitors are highly likely to participate in boardwalk exhibits, evening programs and Visitor Reception Centre. The underlying structure of the market on the horizontal axis appears to be fun and family programs on the left and more educational programs on the right 67% of weighted variance is accounted for by the first dimension. The vertical axis accounting for 17% of variance does not lend itself to a clear interpretation. The underlying market structure of two segments in figure 1 seems to be confirmed in figure 2.

1. Visitors from Kent (KE) Northumberland (NO) and other New Brunswick (NB)

Tend to prefer family outing and fun programs such as special event, campfires, puppet show (on the left of figure 2).

2. Visitors from Québec (QC), U.S.A. (US), Ontario (ON) Westmorland (WS) and Atlantic except New Brunswick (AT)

Are more likely to prefer more educational programs such as Visitor Reception Centre exhibits, audiovisual show, evening programs, boardwalk exhibits.

In the case of figure 2, Westmorland is not as clearly within segment 2 as was the case in figure 1. The remaining segment (other Canada) is again marginal and does not appear clearly connected with a particular program.

TABLE 2

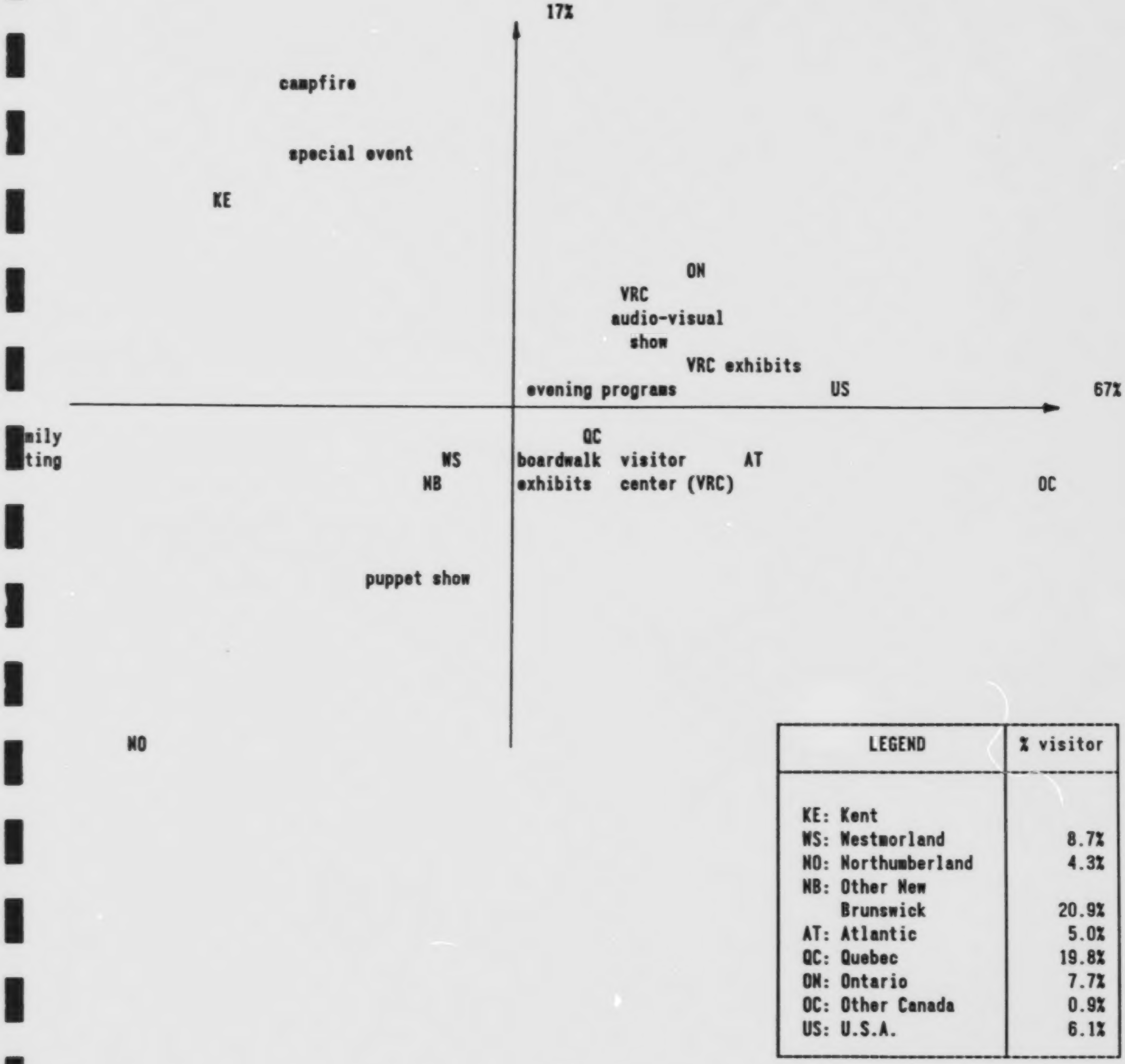
SUMMER PROGRAMS PARTICIPATION AS A FUNCTION OF ORIGIN

(N= 21426)

ORIGIN PROGRAMS	KENT	WEST-MORLAND	NORTHUMBERLAND	OTHER NEW BRUNSWICK	ATLANTIC	QUEBEC	ONTARIO	OTHER CANADA	U.S.A.
Visitor Reception Centre (VRC)	1415	932	186	2237	786	3194	1032	62	909
VRC Exhibit	859	466	93	1258	498	1957	815	62	727
VRC Audio-visual show	609	278	47	746	353	1237	571	0	364
Family outing	1690	466	326	1164	184	1032	272	0	172
Puppet show	451	233	186	699	183	810	82	0	109
Boardwalk exhibits	1765	792	373	1182	642	3008	1141	62	764
Evening program	544	280	93	513	263	846	381	62	280
Campfire	849	186	0	466	130	730	190	0	99
Special event	258	93	0	280	27	178	82	0	37

FIGURE 2

MAPPING OF SUMMER PARTIES ACCORDING TO ORIGIN IN RELATION TO SUMMER PROGRAMS



LEGEND	% visitor
KE: Kent	
WS: Westmorland	8.7%
NO: Northumberland	4.3%
NB: Other New Brunswick	20.9%
AT: Atlantic	5.0%
QC: Quebec	19.8%
ON: Ontario	7.7%
OC: Other Canada	0.9%
US: U.S.A.	6.1%

3.5 Crosstabulations of origin by trails, day use areas and services used.

Table 3 indicates the weighted frequencies of trails, day use areas and services used by the origin of summer visitors. Examination of figures in table 3 reveal that some trails are used less such as Tweedie and Cedars trails but a clear multivariate relationship is not possible without a graphical display of the data.

3.6 Mapping of summer parties according to origin in relation to trails, day use areas and services used.

Figure 3 presents the graphical display of the data in table 3. The interpretation of figure 3 is made in similar manner as for the previous figures. The underlying structure of the market (although less clear in this case) seems to be confirmed. Segment 1 (KE, NO, NB) is connected with day use areas related with beach, swimming-sunbathing and picknicking. Segment 2 (QC, US, AT) is more related to trails connected with nature study. However, Ontario (ON), Westmorland (WS), and other New Brunswick (NB) are not as clearly associated with either segment 1 or segment 2 as was the case in figures 1 and 2. Other Canada (OC) remains clearly a marginal segment far from the centre of the graphical display.

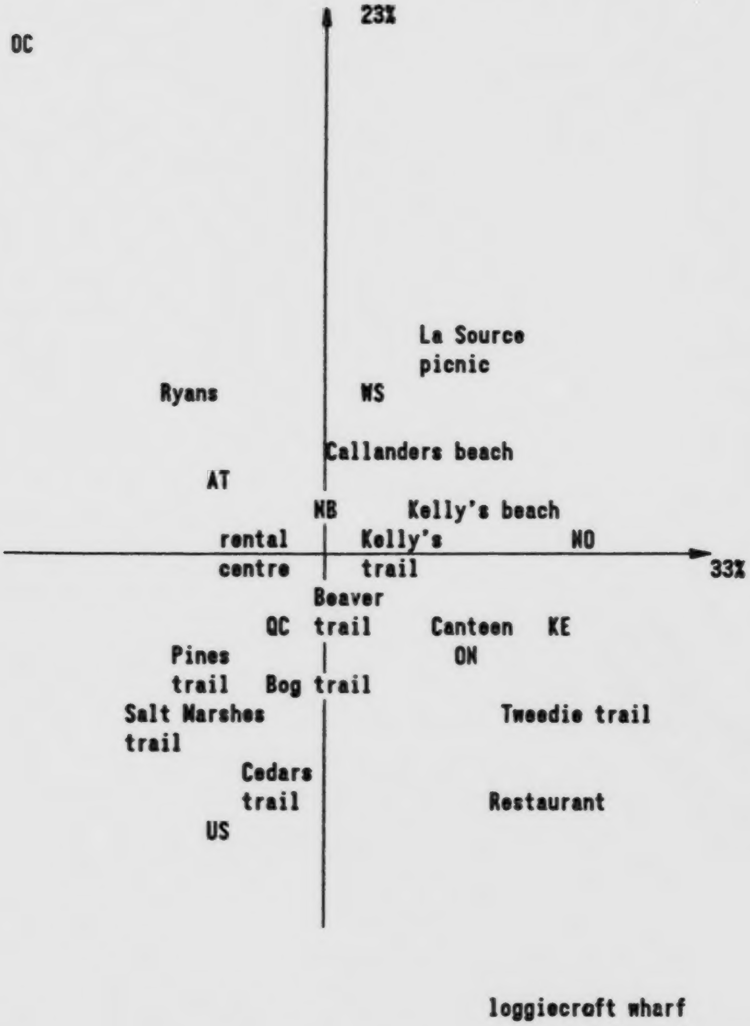
TABLE 3

TRAILS, DAYS USE AREAS AND SERVICES USED AS A FUNCTION OF ORIGIN

ORIGIN TRAILS SERVICE AREAS	KENT	WEST-MORLAND	NORTHUM BERLAND	OTHER NEW BRUNSWICK	ATLANTIC	QUEBEC	ONTARIO	OTHER CANADA	U.S.A.
Trails									
Kelley's trail	3971	1491	559	3541	734	3301	1250	125	1018
Salt Marshes trail	795	419	93	1165	3946	1735	3532	0	473
Bog trail	849	326	47	1025	223	996	2995	0	400
Pines trail	591	233	47	606	327	925	1901	0	255
Beaver trail	1357	373	186	1351	301	1281	217	62	509
Cedars trail	367	140	47	233	92	391	109	0	182
Tweedie trail exhibits	387	93	47	186	92	178	541	0	109
Services									
Rental centre	1375	373	138	1072	486	1245	272	62	400
Restaurant	1715	289	47	1025	210	1095	326	0	400
Canteen	3445	1072	559	2720	773	2696	978	0	655
Day use areas									
Ryans	813	419	140	1351	485	1210	353	125	364
Kelly's beach	4240	1584	792	3885	944	3407	1413	62	873
Callanders beach	1099	466	140	699	144	1023	190	62	145
Loggiecroft wharf	415	0	47	138	26	285	163	0	145
La Source picnic	866	513	0	670	197	498	82	0	72

FIGURE 3

MAPPING OF SUMMER PARTIES ACCORDING TO ORIGIN IN RELATION TO TRAILS, DAY USE AREAS AND SERVICES USED



LEGEND	% v sitors
KE: Kent	26.6%
WS: Westmorland	8.7%
NO: Northumberland	4.3%
NB: Other New Brunswick	20.9%
AT: Atlantic	5.0%
QC: Quebec	19.8%
ON: Ontario	7.7%
OC: Other Canada	0.9%
US: U.S.A.	6.1%

3.7 Crosstabulation of summer parties origin as a function of park evaluation.

At the end of the visitor survey, respondants were asked to formulate in a few words what does Kouchibouguac meant to their party. The very high response rate to this question (90% of the parties) justifies the selection of this variable for further examination. A pie-shaped diagram is present on the next page to indicate the type and frequencies of comments. "Nice Park" and "Nature-Scenic" account for over half (51.2%) of the comments.

To further examine the underlying structure of the summer market, perceptions of visitors with respect to the park were crosstabulated with origin. Table 4 indicates the weighted frequencies of park evaluations by origin. Examination of figures in table 4 reveal that the scenic and natural aspects of the park are dominant among Québec visitors. However examination of row data does not lend itself to a clear interpretation. A graphical display is presented in figure 4 to take account of relative figures and the underlying structure in the data.

PARK EVALUATION
(KNP IN FEW WORDS)
(N=19288)

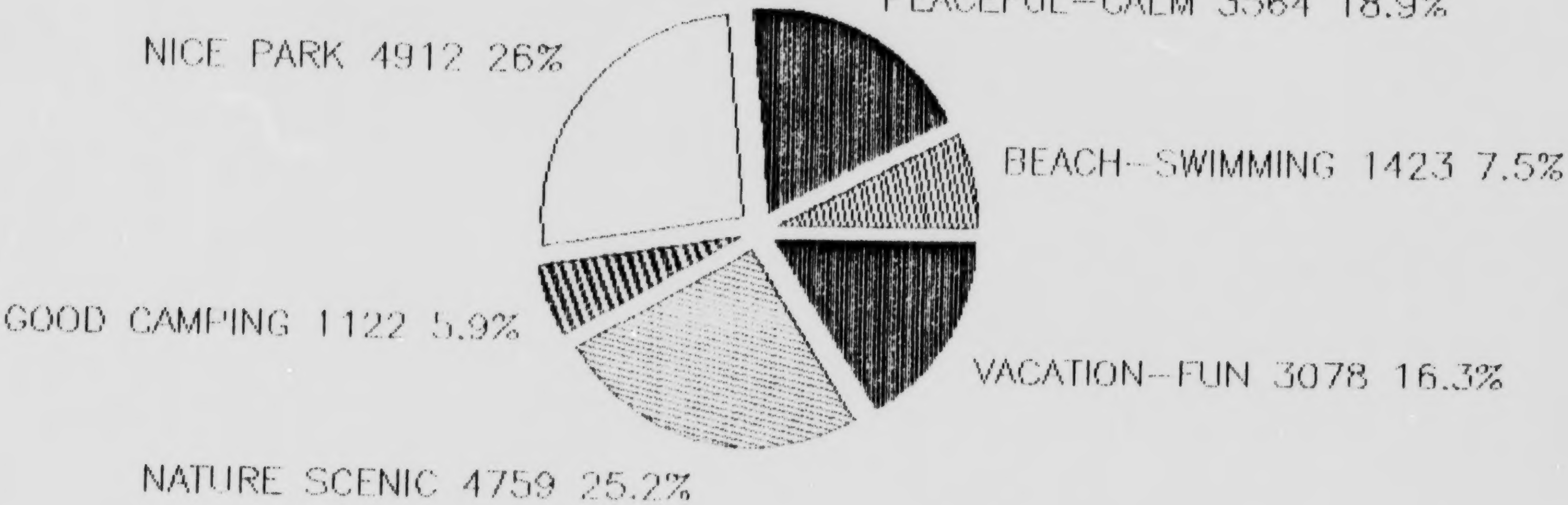


TABLE 4

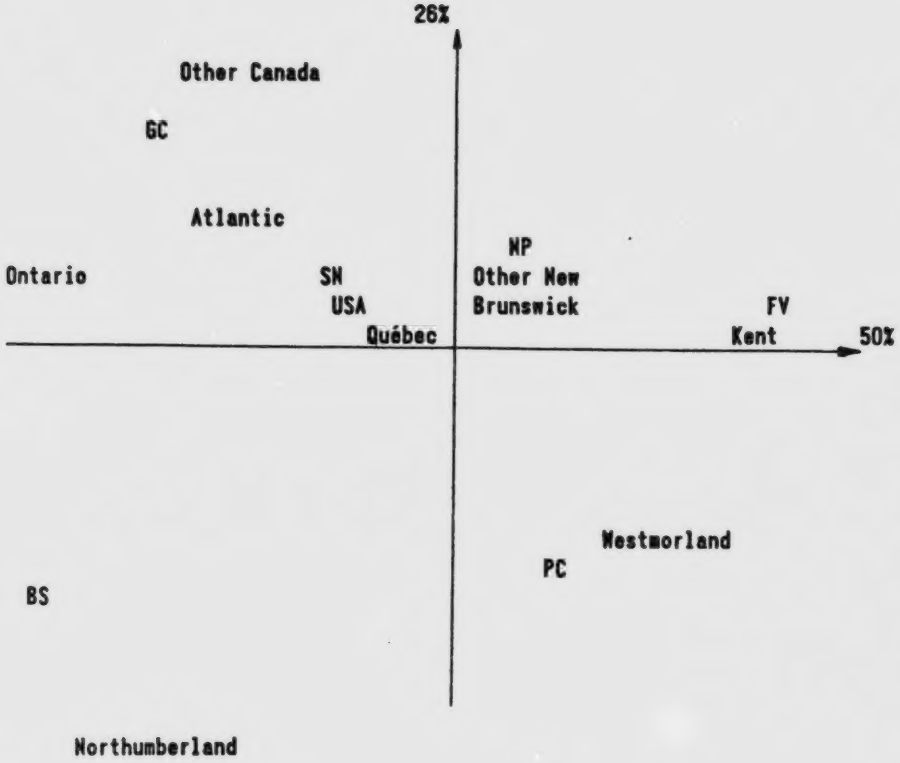
SUMMER PARTIES ORIGIN AS A FUNCTION OF PARK EVALUATION (KNP IN FEW WORDS)

(N=21426)

PARK EVALUATION ORIGIN	BEACH SWIMMING	PEACEFUL CALM	NICE PARK	GOOD CAMPING	SCENIC NATURE	FUN VACATION
Kent	158	977	1386	129	895	1257
Westmorland	93	513	373	47	326	326
Northumberland	233	280	93	0	186	47
Other New Brunswick	233	652	1229	280	792	606
Atlantic	104	105	131	156	315	158
Quebec	249	774	810	285	1174	427
Ontario	245	82	380	190	408	82
Other Canada	0	0	62	0	124	0
U.S.A.	109	145	390	36	327	73

FIGURE 4

MAPPING OF SUMMER PARTIES ACCORDING TO PARK EVALUATION
IN RELATION TO ORIGIN



LEGEND	% of visitors
BS: Beach swimming	7.6%
PC: Peaceful	18.9%
NP: Nice Park	26.0%
GC: Good camping	6.0%
SN: Scenic Nature	25.2%
FV: Fun vacation	16.3%

3.8 Mapping of summer parties according to park evaluation in relation to origin.

Figure 4 presents the result of correspondence analysis applied to the data in table 4. Consistent with previous results, Kent visitors are associated with fun vacation (FV) and Québec, Ontario, US and Atlantic (except New Brunswick) visitors are more related with the scenic and natural aspects. In the case of figure 4, the underlying dimensions do not lend themselves to a simple interpretation.

3.9 Crosstabulation of summer activities as a function of park evaluation

Table 5 presents the weighted frequencies of summer activities by park perception as revealed in an open question (KNP in few words). This crosstabulation and the following associated grahical display is intended to confirm the a priori classificaiton of summer activities that was proposed in section 4.1 of this report.

3.10 Mapping of summer parties according to park evaluation in relation to summer activities.

Figure 5 presents the graphical display associated with table 5. As in figure 4, the underlying dimensions do not lend themselves to a simple interpretation. However, the scenic and natural aspects SN appear closely connected with birdwatching, hichiking nature study and interpretation trails. The relationships

TABLE 5

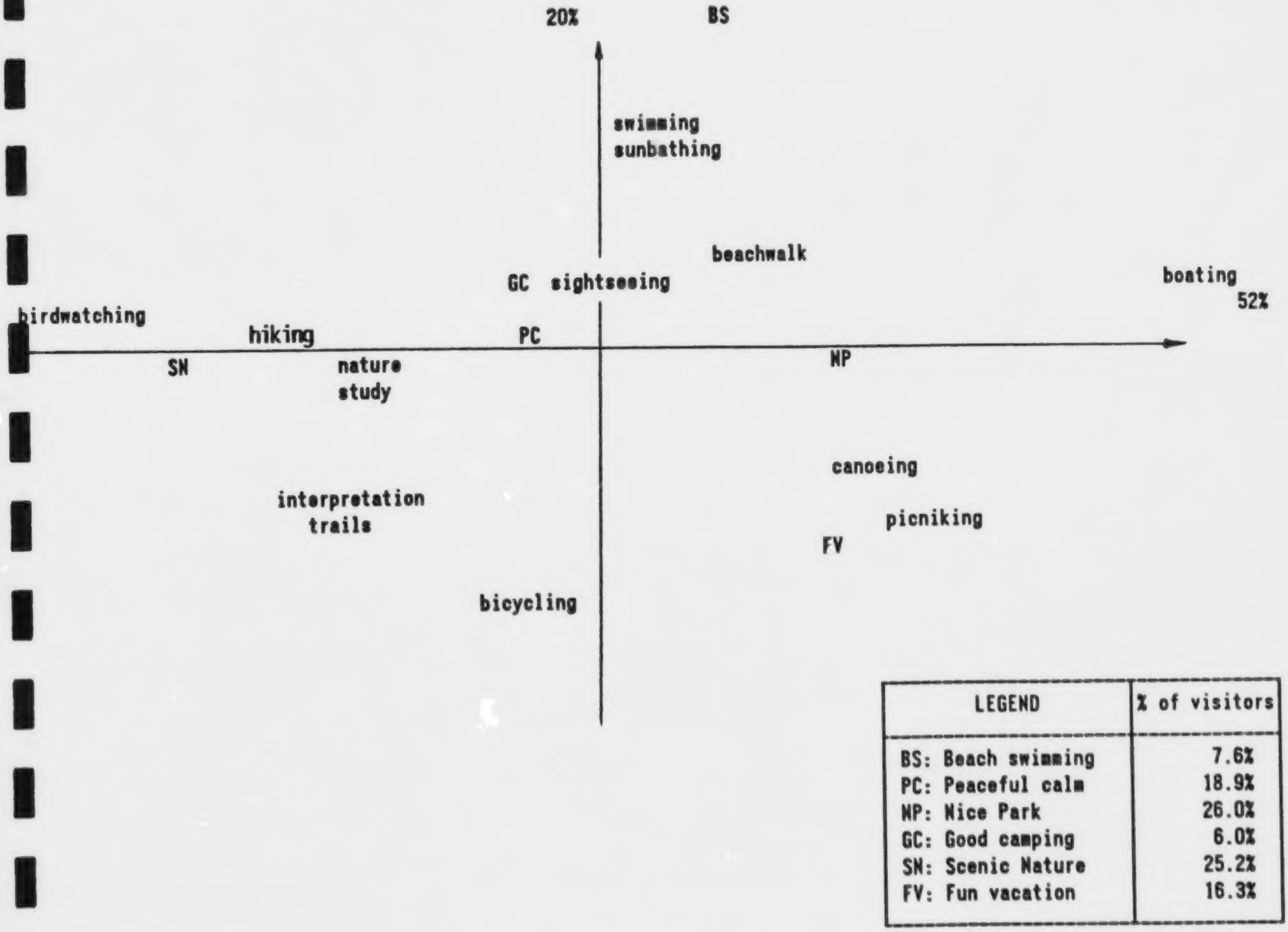
SUMMER ACTIVITIES AS A FUNCTION OF PARK EVALUATION (KNP IN FEW WORDS)

(N=21426)

PARK EVALUATION ORIGIN	BEACH SWIMMING	PEACEFUL CALM	NICE PARK	GOOD CAMPING	SCENIC NATURE	FUN VACATION
Sunbathing swimming	1268	2673	2685	851	3403	1936
Beachwalk	1074	3055	3661	900	3845	2428
Picknicking	608	1938	2804	684	2436	2056
Interpretation trails	480	1740	1749	569	2930	1624
Bicycling	207	1293	1096	400	1676	1137
Hicking	423	1439	1489	493	2185	956
Sightseeing	783	1990	2763	913	3318	1754
Birdwatching	420	1139	1429	416	2568	810
Nature study	473	1787	1904	449	2552	1150
Boating	191	388	784	136	264	479
Canoeing	252	466	879	36	919	662

FIGURE 5

MAPPING OF SUMMER PARTIES ACCORDING TO PARK EVALUATION IN RELATION TO SUMMER ACTIVITIES



LEGEND	% of visitors
BS: Beach swimming	7.6%
PC: Peaceful calm	18.9%
NP: Nice Park	26.0%
GC: Good camping	6.0%
SN: Scenic Nature	25.2%
FV: Fun vacation	16.3%

appearing in figure 5 justify, to some extent, the classification of summer activities suggested in section 4.1

3.11 Crosstabulations of type of activities and party composition as a function of origin

Table 6 presents the weighted frequencies of summer visitors by type of activities and party composition as a function of origin. Summer activities have been classified under the following four headings (as suggested in section 4.1):

1. Beach
2. Family outing
3. Nature
4. Boat fishing

The row data in table 6 are interpreted on a multivariate basis with correspondence analysis and the associated graphical display presented in figure 6.

3.12 Mapping of summer parties according to origin in relation to type of activities and party composition.

Figure 6 presents the graphical display associated with table 6. The interpretation of figure 6 confirms the association of Québec (QC), Ontario (ON), U.S.A. (US) and Atlantic (AT) visitors with nature. Kent (KE), other New Brunswick (NB) and Westmorland (WS) visitors appear more related with beach and sportive activities. The market segmentation structure suggested by figure 1 is to some extent confirmed with Westmorland visitors appearing less clearly in the second market segment.

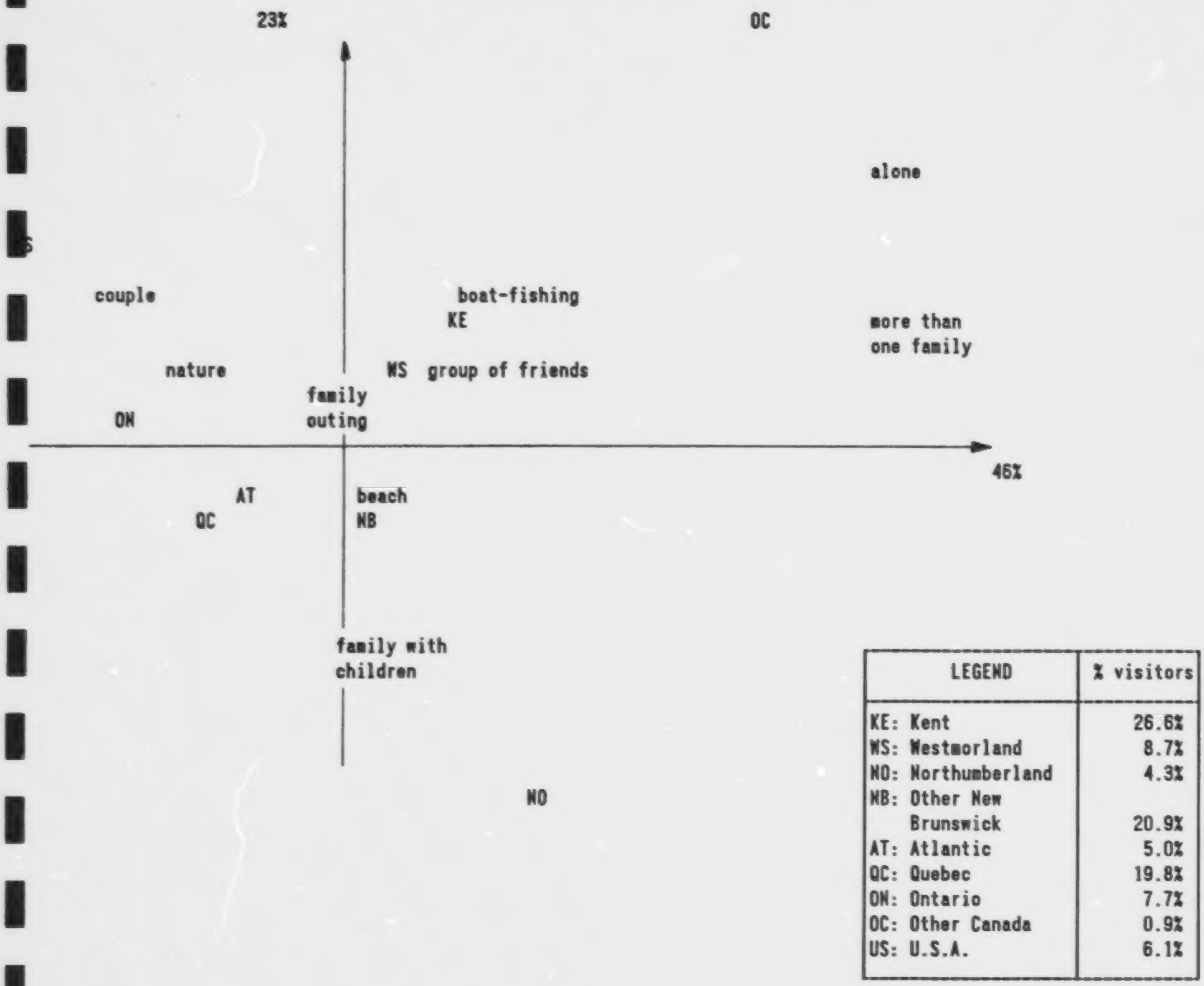
TABLE 6

TYPE OF ACTIVITIES AND PARTY COMPOSITION AS A A FUNCTION OF ORIGIN (WEIGHTED)

ORIGIN	KENT	WEST-MORLAND	NORTHUM BERLAND	OTHER NEW BRUNSWICK	ATLANTIC	QUEBEC	ONTARIO	OTHER CANADA	U.S.A.
Activities (N=21416)									
.Beach	4006	1164	722	3177	839	3247	1181	62	813
.Family outing	2427	967	279	2090	521	2026	625	31	624
.Nature	1961	745	140	1560	524	2248	734	41	700
.Boat-fishing	786	155	47	466	113	356	72	0	109
Party composition (N=21416)									
.Alone	802	186	0	280	51	178	0	0	0
.Couple	1579	606	93	1305	314	1459	788	62	800
.Family with children	1977	699	559	2068	433	1976	625	0	317
.More than one family	591	233	140	280	26	142	54	62	36
.Group of friends	591	93	93	419	184	356	136	62	109

FIGURE 6

MAPPING OF SUMMER PARTIES ACCORDING TO ORIGIN IN RELATION TO TYPE OF ACTIVITIES AND PARTY COMPOSITION



LEGEND	% visitors
KE: Kent	26.6%
WS: Westmorland	8.7%
NO: Northumberland	4.3%
NB: Other New Brunswick	20.9%
AT: Atlantic	5.0%
QC: Quebec	19.8%
ON: Ontario	7.7%
OC: Other Canada	0.9%
US: U.S.A.	6.1%

ECONOMIC IMPACT SURVEY

1.1 General descriptive results

In the economic impact survey, only parties from outside Kent County were included in the analysis. As indicated in table 1, nearly 50% of party visitors came to the park for the first time, which is different from the winter market were 88.6% were repeat visitors.

TABLE 1

NUMBER OF TRIPS TO THE PARK

(N= 17049)

	% OF PARTIES
First trip	47.8%
Not the first trip	52.2%
	100.00%

When the visit to the park is the first, the reasons for not coming before were: Distance, the lack of time, and being for the first time in New Brunswick for 51.5% of visitor parties. 23% of the parties did not come before because they were not aware of Kouchibouguac National Park.

TABLE 2

FIRST TRIP VISITORS (47.8%): REASONS FOR NOT COMING BEFORE

REASONS	% OF PARTIES
- Distance	25.5%
- Lack of knowledge of adversiting	23.1%
- First time in New Brunswick	14.4%
- Other priorities	13.2%
- Time	11.6%
- No particular reasons	5.8%
- Park inconvenients	4.1%
- Other reasons	2.3%

Considering the visit to the park, it is interesting to note that nearly 70% of party visitors planned their visit less than one month before or on the way. Only 26% planned their visit at least one month before.

TABLE 3

WHEN THE PARK VISIT WAS PLANNED

	% OF PARTIES
More than three months before	12.5%
1 to 3 months before	13.6%
less than 1 month before	32.9%
On the way	35.0%
Don't know	6.0%

Most parties who visited the park live far from Kouchibouguac (36.7% over 500miles, 50% over 200 miles).

TABLE 4

DISTANCE BETWEEN THE PARK AND VISITORS' HOME

	% OF PARTIES
Under 50 miles	19.7%
50 to 100 miles	15.7%
101 to 200 miles	14.7%
201 to 500 miles	13.2%
Over 501 miles	36.7%

During that same trip parties also visit other national parks, especially Fundy (17.8%) and P.E.I. (15.6%) National parks. However, 67% of responding parties did not visit another park during that trip.

TABLE 5

OTHER NATIONAL PARKS VISITED

PARKS	% OF PARTIES
Fundy N.P.	17.83% *
Prince Edward Island N.P.	15.64%
Cape Breton N.P.	8.40%
Kejimkujik N.P.	5.60%
Gros Morne N.P.	1.65%
Terra Nova N.P.	1.53%
Other National Parks	11.84%

* 17.83 of parties have at least visited Fundy N.P.

1.2 Descriptive results in relation with the time spent in different places

The total trip length is really different depending on party visitors and their origin (see table 14) which explains an important gap between mean (8.9 days) and median (5 days). The frequencies show that:

about 25% had a short trip (less than one day)

about 27% had a long trip (more than one week).

TABLE 6

LENGTH OF TOTAL TRIP

	FREQUENCY	%
Less than one day	3749	23.5%
One day	717	4.5%
Two days	1487	9.3%
Three to four days	1856	11.6%
5 to 7 days	2165	13.6%
8 to 14 days	2991	18.7%
15 to 21 days	1838	11.5%
21 to 30 days	582	3.6%
More than one month	594	3.7%
	15977	100.00%

Mean = 8.9 days
Median = 5 days

Time spent in New Brunswick is shorter than total trip length (mean= 5 days, median= 3 days). One difficulty met in the analysis deals with the number of missing values concerning the answer "less than one day". In fact people who answered "less than one day" to the question "length of total trip", are mostly people from New Brunswick, and for that reason they thought they were not supposed to answer this question. However we can note that about 20% of the parties spent more than one week in New Brunswick.

TABLE 7

LENGTH OF TRIP IN NEW BRUNSWICK

	FREQUENCY	%
Less than one day	2029	14.4%
One day	1167	8.3%
Two days	2155	15.3%
Three to four days	3297	23.4%
5 to 7 days	2876	20.4%
8 to 14 days	1900	13.5%
More than 2 weeks	684	4.8%
	14108	

Mean = 5.0 days
Median = 3 days

Considering the time parties spent in Kent county, we note that 28% spent less than one day. Time spent in the county seems to be very short (about 60% of parties spent two nights or less in the county) and the median (1.5 days) is a better measure than the average to give an evaluation of the time spent in Kent.

TABLE 8

TIME SPENT IN KENT COUNTY

	FREQUENCY	%
Less than one night	4033	28.1%
One night	2100	14.6%
Two nights	2325	16.2%
Three nights	1411	9.8%
Four nights	1539	10.7%
More than four nights	2947	20.6%
	14355	100.00%

Mean = 3.48 days
Median = 1.5 days

Even if the length of visit in Kent county is short, it is interesting to look at the different types of accomodation used by visitor parties, who spent at least one night in Kent county. About 80% of parties spent at least one night in the park (park campgrounds). Camping is the type of accomodation used by nearly all visitors (park or private campgrounds).

TABLE 9

PERCENTAGE OF VISITORS WHO SPENT AT LEAST ONE NIGHT IN KENT COUNTY IN RELATION TO THE DIFFERENT TYPES OF AGCOMODATION AVAILABLE IN THE COUNTY

(N= 10269)*

ACCOMODATION	% OF VISITORS PARTIES WHO SPENT ONE NIGHT OR MORE IN KENT COUNTY	
South Kouchibouguac	67.5%	Accomodation in the park for at least 1 night = 82.6%
Côte à Fabien	9.6%	
Other Park Campgrounds	5.5%	
Private campgrounds	22.7%	Accomodation outside the park fo at least 1 night = 49%
Motel, Cabins, Hotel, etc.	14.0%	
Private Home	9.4%	
Other	3.6%	

* Visitors who spent 1 night or more in Kent county.

Note: The sum of the percentages is higher than 100% because some visitors spent nights in differents accomodations (ie: campgrounds and motel). The percentages refer to visitors who spent at least one night in the different types of accomodation available in Kent county.

As a conclusion, we can note that people who visit the park spent one or two days in Kent county whereas the length of the total trip is about 5 to 9 days.

1.3 Descriptive results in relation with parties expenditures

Once again the variance in the answers was important. So, it was necessary to compute the mean and the median to get a better idea of the dollar amount spent during the trip.

During the total trip, parties spent about $300.00 to $600.00. The frequencies are presented in table 10, and we can explain the variance by the length of the trip which differs between parties. However it is interesting to note that:

- 45% of the parties spent less than $250.00 during their trip.
- 17% of the parties spent more than $1,000.00 during their trip.

TABLE 10

TOTAL TRIP EXPENDITURES

	FREQUENCIES	% OF PARTIES
Less than one $ 100.00	3169	25.4%
$100.00 to $250.00	2485	19.9%
$251.00 to $500.00	2101	16.9%
$501.00 to $1,000.00	2318	18.6%
$1,001.00 to $2,000.00 $	1702	13.7%
More than $2,000.00	690	5.5%
	12464	100.00%

Mean = $685.00
Median = $319.00

Expenditures in Kent county were about $100.00 to $150.00 per party (mean = $146.00, median = $80.00). It was difficult to analyze the different types of expenditures because respondants did not answer to all the questions.

TABLE 11

EXPENDITURES IN KENT COUNTY

	TRANSPOR-TATION N= 10159		FOOD AND BEVERAGES N= 11429		ACCOMMODA-TION N= 8423		RECREATION N= 6201		OTHERS N= 2319	
	Freq.	% of part.	Freq.	% of part.	Freq.	% of part.	Freq.	% of part.	Freq.	% of part.
$10.00 and less	1686	16.6%	2339	20.5%	1222	14.5%	2548	41.1%	654	28.2%
$11.00 to $20.	3170	31.2%	1763	15.4%	1726	20.5%	1097	17.7%	443	19.1%
$21.00 to $30.	2105	20.7%	1385	12.1	1304	15.5%	819	13.2%	410	17.7%
$31.00 to $50.	1792	17.7%	2031	17.8%	1806	21.4%	578	9.3%	225	9.7%
$51.00 to $100.	766	7.5%	2070	18.1	1651	19.6%	668	10.8%	391	16.9%
More than $100.	640	6.3%	1842	16.1%	714	8.5%	492	7.9%	195	8.4
	10159	100.%	11430	100.%	8423	100.%	6202	100.%	2318	100.%
	Mean = $36.6 Median:$23.		Mean = $69. Median= $33.		Mean = $51. Median= $30.		Mean = $38. Median= $15.		Mean = $45 Median= $21	

NOTE: Mean total expenditures in Kent county is: $146.00
Median total expenditures in Kent County is: $80.00

To summarize that question we note that:

86% of parties spent less than $50.00 for transportation in Kent County.

68% of parties spent less than $50.00 for food and beverages in Kent County.

72% of parties spent less than $50.00 for accommodation in Kent County.

89% of parties spent less than $50.00 for recreation in Kent County.

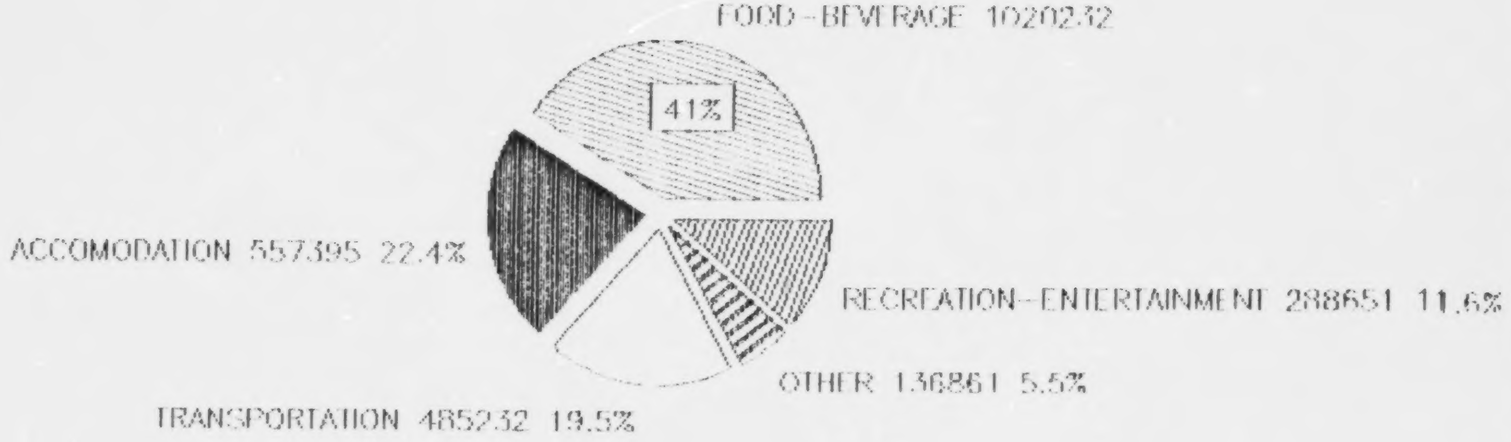
The distribution of expenditures in Kent County is presented in table 12 and the figure next page with the corrected and weighted amount. To determine the total dollar amount spent in Kent County, the total expenditures for each respondant was computed. (see the SAS coding procedure in appendix A).

TABLE 12

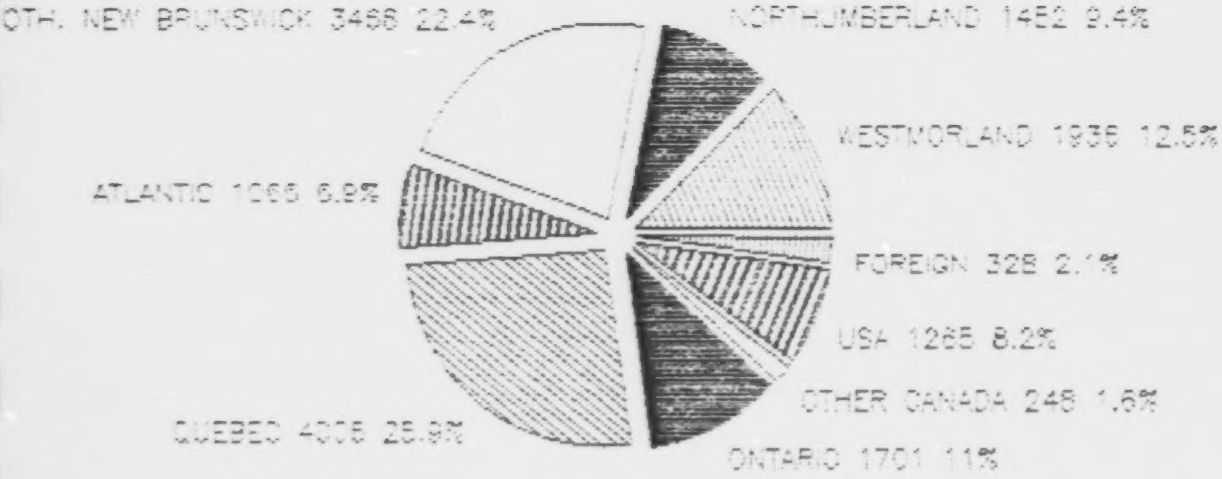
TOTAL EXPENDITURES IN KENT COUNTY
(corrected amount ($)
FOR THE PERIOD: JULY 8 - SEPTEMBER 5, 1988

TOTAL EXPENDITURE		EXPENDITURE/DAY/PARTY
$ 485 232	Transportation	$ 8.07
$ 1 020 232	Food-beverage	$17.00
$ 557 395	Accomodation	$ 9.30
$ 288 651	Recreation/ Entertainment	$ 4.80
$ 136 861	Other expenditures	$ 2.25
$ 2 488 371	TOTAL	$41.42

EXPENDITURES IN KENT COUNTY
(TOTAL $ =2,488,371$)



ORIGIN OF SUMMER PARTIES
(Economic Impact Survey)



Party composition is also an interesting variable. Couple and families account for more than 80% of all parties. This is a notable difference from the winter market were they accounted for only 45.9%.

TABLE 13
PARTY COMPOSITION IN THE ECONOMIC IMPACT SURVEY

PARTY COMPOSITION	% OF PARTIES
Alone	6.3%
Couple	37.3%
Family with children	37.1%
More than one family	8.0%
Group of friends	10.8%
Other	0.5%

1.4 Descriptive results in relation with the origin of parties

The assumption here is that Kent residents should be excluded from further analysis since they already do contribute to the economic impact.

To have a better knowledge of park customers, it is important to knows who are the visitors, what are the party composition, and where they are coming from.

Parties origin present interesting results (see pie diagram).
The two largest markets are: Quebec (25.9%)
Other New Brunswick (22.4%)

But, the most important fact to note is that:

- 45% of parties (outside from Kent) came from New Brunswick.
- 90% of parties (outside from Kent) came from Canada.

1.5 Crosstabulations

1.5.1 Crosstabulations of parties origin with:

1.5.1.1. - Total trip in days
1.5.1.2 - New Brunswick trip in days
1.5.1.3. - Number of nights spent in Kent County
1.5.1.4. - Total trip expenditures

1.5.2. Crosstabulation of total trip in days with total expenditures in dollars.

TABLE 14

LENGTH OF TOTAL TRIP (IN DAYS) AS A FUNCTION OF ORIGIN OF SUMMER VISITOR PARTIES

(N = 17 049)

ORIGIN NUMBER OF DAYS	WESTMOR-LAND	NORTHUM-BERLAND	OTHER NEW-BRUNSWICK	ATLANTIC	QUEBEC	ONTARIO	OTHER CANADA	USA	FOREIGN COUNTRIES
- 0 day	484	242	1 008	197	786	316	62	295	109
- 1 day	161	81	121	31	221	40	62	0	0
- 2 days	282	81	202	63	418	79	0	42	36
- 3 to 4 days	202	121	323	295	393	158	0	126	36
- 5 to 7 days	242	363	323	94	467	277	31	211	36
- 8 to 14 days	161	242	605	165	737	316	31	337	73
- 15 to 20 days	242	242	403	94	540	79	31	84	0
- 21 to 30 days	40	0	121	63	197	119	0	42	0
- more than 30 days	0	40	121	31	123	119	0	42	36

TABLE 15

LENGTH OF NEW BRUNSWICK TRIP (IN DAYS) AS A FUNCTION OF ORIGIN OF SUMMER VISITOR PARTIES

(N = 17 049)

ORIGIN NUMBER OF DAYS	WESTMOR-LAND	NORTHUM-BERLAND	OTHER NEW-BRUNSWICK	ATLANTIC	QUEBEC	ONTARIO	OTHER CANADA	USA	FOREIGN COUNTRIES
- less than one day	363	161	363	71	516	158	31	169	109
- 1 day	161	161	161	31	270	79	62	42	36
- 2 days	363	121	323	197	467	237	0	84	0
- 3 to 4 days	323	323	726	389	860	158	31	169	36
- 5 to 7 days	282	444	484	94	664	396	62	253	73
- 8 to 14 days	161	81	363	94	516	237	0	253	73
- 15 days and more	40	40	202	31	246	0	0	84	0

TABLE 16

NUMBER OF NIGHTS SPENT IN KENT COUNTY AS A FUNCTION OF ORIGIN OF SUMMER VISITOR PARTIES

(N = 17 049)

NUMBER OF NIGHTS ORIGIN	0 NIGHT	1 NIGHT	2 NIGHTS	3 NIGHTS	4 NIGHTS	5 NIGHTS AND MORE
- Westmorland	524	282	403	121	121	282
- Northumberland	242	323	121	161	161	282
- Other New Brunswick	806	323	323	202	363	685
- Atlantic	331	31	189	189	106	94
- Québec	1 008	565	565	320	344	811
- Ontario	435	158	198	79	158	356
- Other Canada	31	62	31	0	31	31
- USA	253	126	126	126	84	379
- Foreign countries	73	109	0	36	36	36

TABLE 17

TOTAL TRIP EXPENDITURES OF THE SUMMER VISITOR PARTIES AS A FUNCTION OF ORIGIN

(N = 17 049)

ORIGIN $ SPENT	WESTMOR-LAND	NORTHUM-BERLAND	OTHER NEW-BRUNSWICK	ATLANTIC	QUEBEC	ONTARIO	OTHER CANADA	USA	FOREIGN COUNTRIES
- less than 100 $	363	242	645	197	786	277	62	169	146
- 100 to 250 $	323	242	403	169	590	237	31	126	0
- 251 to 500 $	202	40	444	228	541	316	0	169	0
- 500 to 1 000 $	403	202	484	31	369	237	62	295	73
- 1 000 to 2 000 $	120	282	363	94	492	79	31	42	36
- more than 2 000 $	0	121	161	31	221	119	0	0	36

TABLE 18

LENGTH OF TOTAL TRIP (IN DAYS) AS A FUNCTION OF TOTAL EXPENDITURES (IN DOLLARS)

(N = 17 049)

$ SPENT NUMBER OF DAYS	LESS THAN $ 100	$ 100 - 250	$ 251 - 500	$ 501 - 1 000	$ 1 001 - 2 000	MORE THAN $ 2 000
- 0 days	1 965	89	0	80	31	0
- 1 day	362	104	0	40	0	0
- 2 days	442	494	145	65	0	0
- 3 to 4 days	152	990	307	201	0	0
- 5 to 7 days	81	388	524	466	81	104
- 8 to 14 days	0	347	826	728	588	65
- 15 to 20 days	0	31	113	575	609	202
- 21 to 30 days	25	0	0	122	257	113
- more than 30 days	0	0	0	40	137	206

1.6 Method used for the economic impact analysis

To determine the economic impact of park visitors for the county of Kent different adjustments were made;

1) Visitor parties coming from Kent county were excluded from the analysis.

2) The weighted number of parties (N= 17049) has been consider as the basis of the analysis.

3) Some modifications have been made in the data base to create new variables more useful for the analysis.

KNIGHT= is the time spent in Kent county, even if that time was less than 24 hours.

TOTAL TRIP (EI5)= is the length of the total trip even if it was less than 24 hours.

KENTDEP= is the total of all expenditures spent in Kent (EI20 + EI21 + EI22 + EI23 + EI24)

4) Several variables were included in the economic impact analysis and for each variable there was a different number of respondants.

Length of total trip (N= 15977)
Length of trip in Kent county (N= 14355)
Expenditures during the all trip (N= 12464)
Expenditures in Kent county (N= 13118)

As the number of respondants was different for each variable it was necessary to use a common base to compare results. So we decided to adjust all variables to obtain the same number of respondants for all variables (N= 17049)

To determine new values for each variable we computed a correction coefficient for each variable, such as:

$$\frac{17049}{\text{Number of respondants for variable}}$$

In fact we considered the behavior of missing respondants to be similar as the one of valid respondants. Thus, frequencies only were adjusted, percentages did not change.

Adjusted variables are:

	Sample sum	Corrected sum (N=17049)
Number of visitors	15,470 visitors	17,049 visitors
Total trip days	143,770 days	153,415 days
Total days spent in Kent county	50,581 days	60,072 days
Total trip expenditures	$8,539,177.00	$11,679,831.00
Expenditures on Kent County	$1,914,684.00	$2,488,371.00

5) The analysis of the economic impact has been done by computing different ratios. These ratios are very useful to compare and to classify party visitors as a function of their origin. And this is so because of differences in market size for each origin. So to make comparisons between visitor origins it was necessary to compute ratios on the same basis (i.e = expenditures per day and per party).

6) Using descriptive statistics like the variance or the standard deviation we noted that there was a lot of spread in all the variables concerning time spent or expenditures. As a consequence mean and median were both used in the analysis. Considering the results on means only will tend to inflate results and therefore these two statistical measures are presented.

In fact, all these changes, corrections or adjustments were not only useful for the analysis but also necessary to determine the real impact of summer visitor parties for Kent county as precisely as possible.

TABLE 19

ECONOMIC IMPACT RESULTS

	MEAN	SUM(Si)	NUMBER OF RESPONDANTS (Ni)	CORRECTION INDEX (Ci = 17 049/Ni)	CORRECTED SUM (Si x Ci)
Total trip days	8.99 days	143 770 days	15 977	1.067	153 415 days
Time spent in Kent County	3.48 days	50 581 days	14 355	1.187	60 072 days
Total trip expenditures	685 $	8 539 177 $	12 464	1.368	11 679 831 $
Kent County Expenditures	146 $	1 914 684 $	13 118	1.299	2 488 371 $

Ratios

1. Time spent in Kent County/total trip length: 39.15 %
2. Expenditures in Kent County/Expenditures during total trip: 21.30 %
3. Average daily expenditures during the all trip: 76.13 $ per day
4. Average daily expenditures in Kent County: 41.42 $ per day

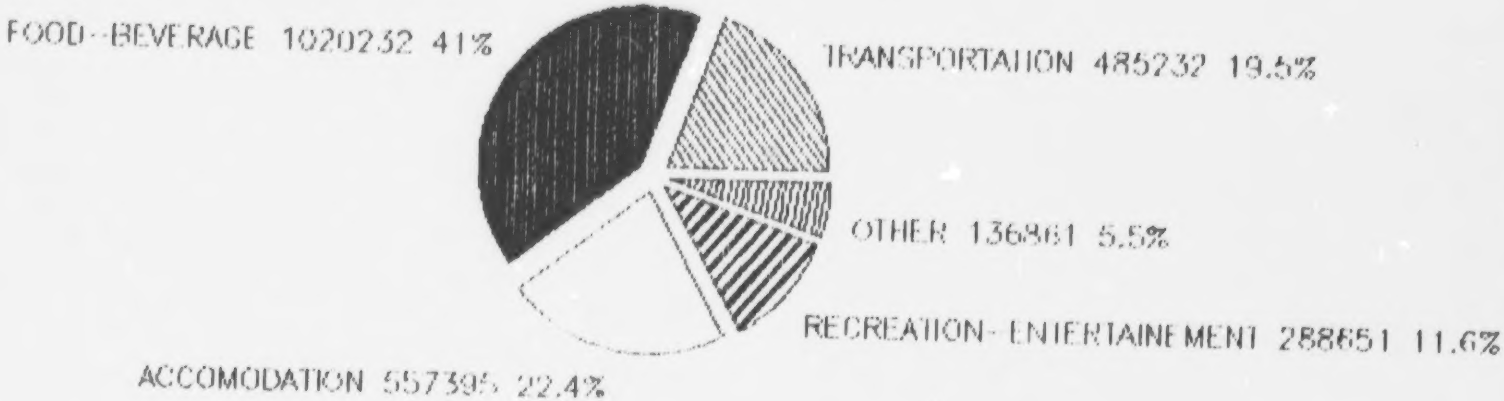
TABLE 20

ECONOMIC IMPACT RESULTS BY REGION (VISITORS ORIGIN)

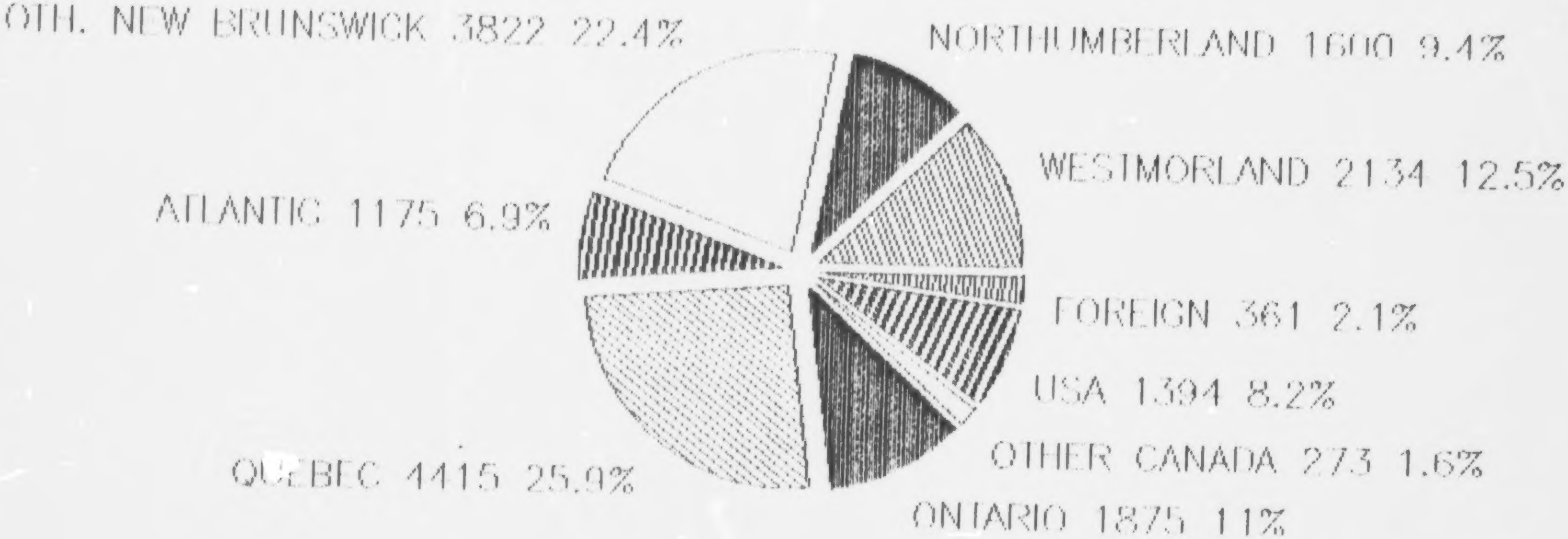
(Before and after adjustments)

VISITORS ORIGIN (REGION)	TOTAL NUMBER OF VISITORS IN THE PARK		TOTAL DAYS SPENT IN KENT COUNTY		TOTAL EXPENDITURES ($) IN KENT COUNTY	
	NUMBER OF VISITORS	CORRECTED NUMBER OF VISITORS	DAYS SPENT	CORRECTED DAYS SPENT	$ SPENT	CORRECTED $ SPENT
Westmorland	1 936	2 134	4 435	5 579	231 750	322 265
Nortumberland	1 452	1 600	4 557	5 733	221 548	308 078
Other New Brunswick	3 468	3 822	12 985	16 335	377 284	524 640
Atlantic	1 066	1 175	2 989	3 761	111 689	155 312
Quebec	4 066	4 415	12 609	15 863	509 209	708 091
Ontario	1 701	1 875	4 549	5 723	146 207	203 311
Other Canada	248	273	434	546	15 190	21 123
USA	1 265	1 394	4 427	5 570	154 752	215 194
Foreign	328	361	765	963	21 830	30 357
Total	15 470	17 049	47 501	60 073	1 789 459	2 488 371

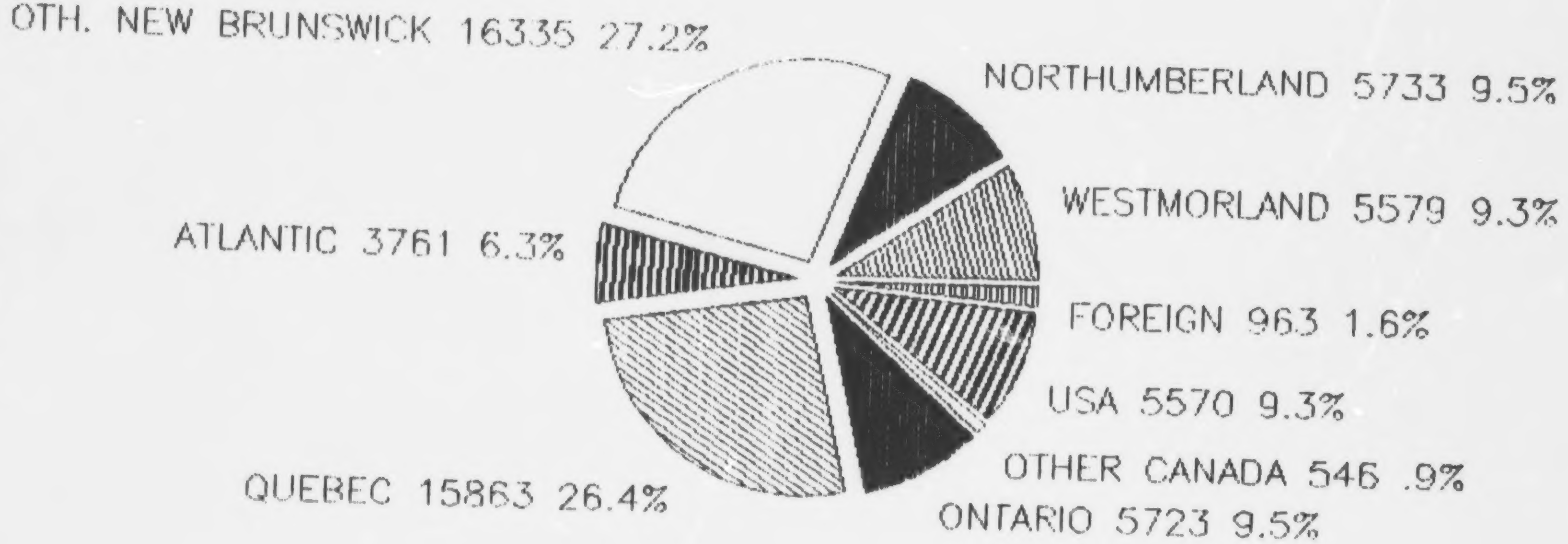
EXPENDITURES IN KENT COUNTY
(TOTAL $ = 2,488,371$)



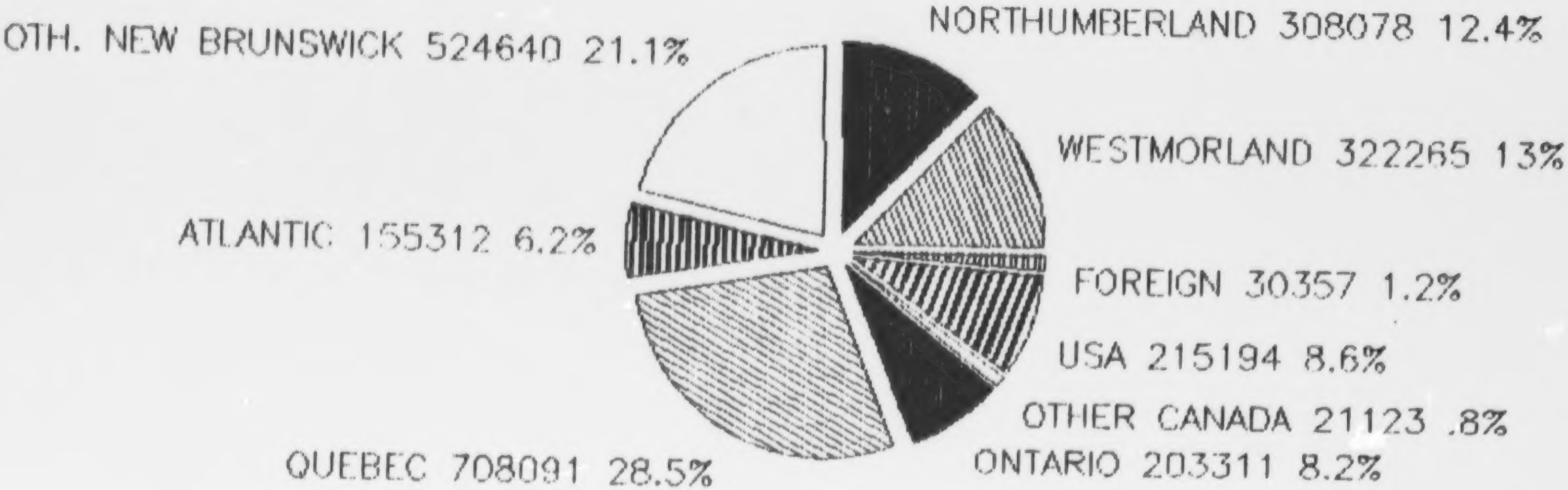
TOTAL NUMBER OF PARTIES AS A FUNCTION OF REGION
(N = 17049 PARTIES)



TOTAL DAYS SPENT IN KENT COUNTY AS A FUNCTION OF REGION
(N = 60073 DAYS)



TOTAL EXPENDITURES IN KENT COUNTY AS A FUNCTION OF REGION
(N = 2,488,371 $)



SAS CODING PROCEDURE FOR THE ECONOMIC IMPACT ANALYSIS

CHAPTER 2

```
NEWORG
ORG=T=21;
CODE1=SUBSTR(V10,1,3);
CODE2=SUBSTR(V10,1,1);
IF CODE1='E1A' THEN REGION='WEST';
IF CODE1='E1B' THEN REGION='WEST';
IF CODE1='E1C' THEN REGION='WEST';
IF CODE1='E1E' THEN REGION='WEST';
IF CODE1='E1G' THEN REGION='WEST';
IF CODE1='E1N' THEN REGION='NRTH';
IF CODE1='E1V' THEN REGION='NRTH';
IF CODE2='E' AND (CODE1 NE '[illegible]' AND CODE1 NE 'E1A' AND CODE1 NE 'E1B'
 AND CODE1 NE 'E1C' AND CODE1 NE 'E1E' AND CODE1 NE 'E1G' AND CODE1 NE
 'E1N' AND CODE1 NE 'E1V') THEN REGION='ONE';
IF V9=3 OR V9=4 OR V9=5 THEN REGION='ATL';
IF V9=7 THEN REGION='QUE';
IF V9=8 THEN REGION='ONT';
IF V9=9 OR V9=12 OR V9=13 THEN REGION='OCD';
IF V9=15 THEN REGION='UTA';
IF V9=16 THEN REGION='FOP';
IF 0<EI6<30 THEN EI5=0;
IF EI5=3 OR EI5=4 THEN EI5=3;
IF EI5=5 OR EI5=6 OR EI5=7 THEN EI5=5;
IF 8<=EI5<=14 THEN EI5=8;
IF 15<=EI5<=21 THEN EI5=15;
IF 22<=EI5<=30 THEN EI5=22;
IF EI5>30 THEN EI5=31;
IF 0<EI6<30 THEN EI7=0;
IF EI7=3 OR EI7=4 THEN EI7=3;
IF EI7=5 OR EI7=6 OR EI7=7 THEN EI7=5:
IF 8<=EI7<=14 THEN EI7=8;
IF EI7>14 THEN EI7=15;
IF 1<=EI20<=10 THEN EI20=10;
IF 11<=EI20<=20 THEN EI20=11;
IF 21<=EI20<=30 THEN EI20=21;
IF 31<=EI20<=50 THEN EI20=31;
IF 51<=EI20<=100 THEN EI20=51;
IF EI20>100 THEN EI20=101;
IF 1<=EI21<=10 THEN EI21=10;
IF 11<=EI21<=20 THEN EI21=11;
IF 21<=EI21<=30 THEN EI21=21;
IF 31<=EI21<=50 THEN EI21=31;
IF 51<=EI21<=100 THEN EI21=51;
IF EI21>100 THEN EI21=101;
IF 1<=EI22<=10 THEN EI22=10;
IF 11<=EI22<=20 THEN EI22=11;
IF 21<=EI22<=30 THEN EI22=21;
IF 31<=EI22<=50 THEN EI22=31;
IF 51<=EI22<=100 THEN EI22=51;
IF EI22>100 THEN EI22=101;
IF 1<=EI23<=10 THEN EI23=10;
IF 11<=EI23<=20 THEN EI23=11;
IF 21<=EI23<=30 THEN EI23=21;
IF 31<=EI23<=50 THEN EI23=31;
IF 51<=EI23<=100 THEN EI23=51;
IF EI23>100 THEN EI23=101;
IF 1<=EI24<=10 THEN EI24=10;
IF 11<=EI24<=20 THEN EI24=11;
IF 21<=EI24<=30 THEN EI24=21;
IF 31<=EI24<=50 THEN EI24=31;
IF 51<=EI24<=100 THEN EI24=51;
IF EI24>100 THEN EI24=101;
IF 1<=EI25<=99 THEN EI25=99;
IF 100<=EI25<=250 THEN EI25=100;
IF 251<=EI25<=500 THEN EI25=251;
IF 501<=EI25<=1000 THEN EI25=501;
IF 1001<=EI25<=2000 THEN EI25=1001;
IF EI25>2000 THEN EI25=2001;
KNIGHT=SUM(EI11,EI12,EI13,EI14,EI15,EI16,EI17);
IF KNIGHT>=5 THEN KNIGHT=5;
IF 0<EI10<25 THEN KNIGHT=0;
LABEL DATE      ='SAS DATE';
```

```
1087          ;
1088          PROC FREQ;
1089          *WHERE [illegible];
1090           TABLES [illegible] SEX [illegible] RENTOWN DIM DXM DRP NUIT;
NOTE: FOR TABLES [illegible] FILE, [illegible]
      PAGE 1 FOR [illegible]
      PAGE 2 FOR [illegible]
      PAGE 3 FOR [illegible]
      PAGE 4 FOR [illegible]
      PAGE 7 FOR RENTOWN
      PAGE 11 FOR DIM
      PAGE 15 FOR DXM
      PAGE 19 FOR DRP

      SAS(R) LOG    OS SAS 5.18                    VS2/MVS JOB P016      STEP SAS

      PAGE 24 FOR NUIT
NOTE: THE PROCEDURE FREQ USED 1.92 SECONDS AND 456K AND PRINTED PAGES 1 TO 25.
1091          PROC SORT;
1092           BY REGION;
NOTE: 4 CYLINDERS DYNAMICALLY ALLOCATED ON SYSDA FOR EACH OF 3 SORT WORK DATA
NOTE: DATA SET WORK.[illegible] HAS 493 OBSERVATIONS AND 93 VARIABLES. 82 OBS/TRK.
NOTE: THE PROCEDURE SORT USED 0.72 SECONDS AND 1136K.
1093          PROC UNIVARIATE;
1094          *WHERE [illegible];
1095           VAR [illegible] 27 SIZE RENTOWN DIM DXM DRP NUIT;
1096           BY REGION;
1097          ;
NOTE: THE PROCEDURE UNIVARIATE USED 1.15 SECONDS AND 240K AND PRINTED PAGES 26
NOTE: SAS USED 1136K MEMORY.

NOTE: SAS INSTITUTE INC.
      SAS CIRCLE
      PO BOX 8000
      CARY, N.C. 27512-8000
```

As regards party composition, visitors from Kent, Northunmberland and Westmorland are more likely to be group of friends or family with children. Visitors from Ontario, Québec and U.S.A are more often in couples.

SAS CODING FOR PROFILING SUMMER PARTIES BY VISIT PURPOSE

CHAPTER 5

```
ORGWT821
;
CODE1=SUBSTR(V10,1,3);
CODE2=SUBSTR(V10,1,1);
IF CODE2='A' THEN REGION='ATL';
IF CODE2='B' THEN REGION='ATL';
IF CODE2='C' THEN REGION='ATL';
IF CODE2='G' THEN REGION='QUE';
IF CODE2='H' THEN REGION='QUE';
IF CODE2='J' THEN REGION='QUE';
IF CODE2='K' THEN REGION='ONT';
IF CODE2='L' THEN REGION='ONT';
IF CODE2='M' THEN REGION='ONT';
IF CODE2='N' THEN REGION='ONT';
IF CODE2='P' THEN REGION='ONT';
IF CODE2='R' THEN REGION='OCDN';
IF CODE2='S' THEN REGION='OCDN';
IF CODE2='T' THEN REGION='OCDN';
IF CODE2='V' THEN REGION='OCDN';


IF CODE2='X' THEN REGION='OCDN';
IF CODE2='Y' THEN REGION='OCDN';
IF CODE1='E0A' THEN REGION='KENT';
IF CODE1='E1A' THEN REGION='WEST';
IF CODE1='E1B' THEN REGION='WEST';
IF CODE1='E1C' THEN REGION='WEST';
IF CODE1='E1E' THEN REGION='WEST';
IF CODE1='E1G' THEN REGION='WEST';
IF CODE1='E1N' THEN REGION='NRTH';
IF CODE1='E1V' THEN REGION='NRTH';
IF CODE2='E' AND (CODE1 NE 'E0A' AND CODE1 NE 'E1A' AND CODE1 NE 'E1B'
 AND CODE1 NE 'E1C' AND CODE1 NE 'E1E' AND CODE1 NE 'E1G' AND CODE1 NE
 'E1N' AND CODE1 NE 'E1V') THEN REGION='ONB';
IF V11 NE ' ' THEN REGION='USA';
LABEL DATE     ='SAS DATE';


PROC FREQ;

WEIGHT ORGWT921;
 TABLES (REGION V14)*(VS3--VS14);

PROC FREQ;
WEIGHT ORGWT921;
 TABLES (REGION V14)*(VS13 VS20 VS22 VS24 VS25 VS26 VS29 VS30 VS32 VS34)
;

PROC FREQ;
WEIGHT ORGWT921;

 TABLES (REGION V14)*(VS36 VS38 VS40 VS42 VS44 VS46 VS48 VS50 VS52 VS54)
 ;

PROC FREQ;
WEIGHT ORGWT921;
 TABLES (REGION V14)*(VS56 VS58 VS60 VS62 VS64 VS66 VS33);
;
```

INTRODUCTION TO CORRESPONDENCE ANALYSIS AND INTERPRETATION

CHAPTER 6

INTRODUCTION TO CORRESPONDENCE ANALYSIS: PRINCIPLES AND APPLICATIONS

OBJECTIVES OF THE ANALYSIS

CORRESPONDENCE ANALYSIS IS A MULTIVARIATE TECHNIQUE WHICH DISPLAYS THE ROWS AND COLUMNS OF A DATA MATRIX AS A SCATTER OF POINTS.

THE TECHNIQUE IS AN ALTERNATIVE TO MORE TRADITIONAL APPROACHES TO PERCEPTUAL MAPPINGS SUCH AS DISCRIMINANT ANALYSIS OR MULTIDIMENSIONAL SCALING, THE TECHNIQUE OFFERS DATA COLLECTION ADVANTAGES RELATIVE TO COMMONLY USED METHODS.

THE TECHNIQUE IS A MULTIVARIATE DESCRIPTIVE STATISTICAL METHOD THAT SIMULTANEOUSLY CONSIDERS THE RELATIONSHIPS BETWEEN THE ROWS AND COLUMNS OF A TWO WAY CONTINGENCY MATRIX.

CORRESPONDENCE ANALYSIS IS ANALOGOUS TO A PRINCIPAL COMPONENTS ANALYSIS OF THE ROWS AND COLUMNS OF A CONTINGENCY TABLE.

INTERPRETATION OF CORRESPONDENCE ANALYSIS

- Similar to principal components analysis
- TOTAL INERTIA

  Chi-square divided by grand total of data matrix.

- Total inertia is decomposed along the principal axes and each Eigenvalue indicates the weighted variance (inertia) explained by each axis of the display.
- INERTIA OF THE POINTS

  Contribution of each points (objects or attributes) to total inertia.

- ABSOLUTE CONTRIBUTIONS TO INERTIA

  Percentage of weighted variance explained by each point in relation to each axis.

- RELATIVE CONTRIBUTIONS TO INERTIA

  Squared correlation between a point and each axis. Indicate how well each point is fit by the representation.

- QUALITY OF THE REPRESENTATION

Sum of the relative contributions over all the axes of interest.

LEGEND FOR THE INTERPRETATION OF PERCEPTUAL MAPS

ORIGIN

KE = Kent
WS = Westmorland
NO = Northumberland
NB = Other New Brunswick
AT = Atlantic (except NB)
QC = Quebec
ON = Ontario
OC = Other Canada
US = U.S.A.

PARK EVALUATION (KNP IN FEW WORDS)

BS = Beach swimming
PC = Peaceful calm
NP = Nice Park
GC = Good camping
SN = Scenic Nature
FU = Fun vacation

ACTIVITIES

.sw = sunbathing - swimming
.be = beachwalk
.pi = picknicking
.fi = fishing
.it = interpretation trails
.bi = bicycling
.hi = hicking
.sg = sightseeing
.bw = bird watching
.ns = nature study
.bo = boating
.ca = canoeing

TYPE OF ACTIVITIES

.b = beach
.f = family outing
.n = nature
.c =boat fishing

PROGRAMS

.vr = Visitor Reception Centre (VRC)
.ve = VRC exhibits
.vc = VRC audio-visual show
.fo = family outing
.ps = puppet show
.be = boardwalk exhibits
.ep = evening programs
.se = special event

TRAILS

.ke = Kelly's trail
.sm = Salt Marshes trail
.bo = Bog trail
.pi = Pines trail
.ce = Cedars trail
.bt = Beaver trail
.tw = Tweedie trail

SERVICES

.rc = rental centre
.rt = restaurant
.ct = canteen

DAY USE AREAS

.ry = Ryans
.kb = Kelly's beach
.cb = Callanders beach
.lw = Loggrecroft Wharf
.ls = La Source picnic

PARTY COMPOSITION

.al = alone
.co = couple
.fc = family with children
.nf = more than one family
.gf = group of friends

COMPLETE PRINTED OUTPUT OF CORRESPONDENCE ANALYSIS
FOR SUMMER ACTIVITIES AS A FUNCTION OF ORIGIN CHAPTER 8

SUMMER ACTIVITIES IN THE PARK AS A FUNCTION OF ORIGIN

DATA MATRIX

	1	2	3	4	5	6	7	8	9	10	11	12	sum
	sw	be	pi	fi	it	bi	hi	sg	bw	as	bo	ca	
1 KR	3849	4164	3305	258	2310	1872	1744	2789	1608	1966	924	1175	25964
2 NS	978	1351	1212	47	792	699	746	1211	652	792	186	233	8899
3 NO	745	699	373	0	186	186	140	419	93	140	93	47	3121
4 NB	2749	3606	2814	47	2050	47	1631	2703	1258	1491	652	699	19747
5 AT	786	892	525	26	708	354	354	851	406	459	157	157	5675
6 QC	3087	3407	1779	107	2304	1486	1940	2901	1779	2660	249	712	22411
7 ON	1005	1358	734	54	761	163	516	1087	734	706	81	81	7280
8 US	582	1045	753	36	764	400	545	800	717	618	36	255	6551
9 OC	62	62	62	0	62	0	0	62	62	0	0	0	372
sum	13843	16584	11557	575	9937	5207	7616	12823	7309	8832	2378	3359	100020

ROW PROFILES

	1	2	3	4	5	6	7	8	9	10	11	12	sum
	sw	be	pi	fi	it	bi	hi	sg	bw	ns	bo	ca	
1 KE	14.8	16.0	12.7	1.0	8.9	7.2	6.7	10.7	6.2	7.6	3.6	4.5	100.0
2 WS	11.0	15.2	13.6	0.5	8.9	7.9	8.4	13.6	7.3	8.9	2.1	2.6	100.0
3 NO	23.9	22.4	12.0	0.0	6.0	6.0	4.5	13.4	3.0	4.5	3.0	1.5	100.0
4 NB	13.9	18.3	14.3	0.2	10.4	0.2	8.3	13.7	6.4	7.6	3.3	3.5	100.0
5 AT	13.9	15.7	9.3	0.5	12.5	6.2	6.2	15.0	7.2	8.1	2.8	2.8	100.0
6 QC	13.8	15.2	7.9	0.5	10.3	6.6	8.7	12.9	7.9	11.9	1.1	3.2	100.0
7 ON	13.8	18.7	10.1	0.7	10.5	2.2	7.1	14.9	10.1	9.7	1.1	1.1	100.0
8 US	8.9	16.0	11.5	0.5	11.7	6.1	8.3	12.2	10.9	9.4	0.5	3.9	100.0
9 OC	16.7	16.7	16.7	0.0	16.7	0.0	0.0	16.7	16.7	0.0	0.0	0.0	100.0
average	13.8	16.6	11.6	0.6	9.9	5.2	7.6	12.8	7.3	8.8	2.4	3.4	100.0

COLUMN PROFILES

	1	2	3	4	5	6	7	8	9	10	11	12	average
	sw	be	pi	fi	it	bi	hi	sg	bw	ns	bo	ca	
1 KE	27.8	25.1	28.6	44.9	23.2	36.0	22.9	21.7	22.0	22.3	38.9	35.0	26.0
2 WS	7.1	8.1	10.5	8.2	8.0	13.4	9.8	9.4	6.9	9.0	7.8	6.9	8.9
3 NO	5.4	4.2	3.2	0.0	1.9	3.6	1.8	3.3	1.3	1.6	3.9	1.4	3.1
4 NB	19.9	21.7	24.3	8.2	20.6	0.9	21.4	21.1	17.2	16.9	27.4	20.8	19.7
5 AT	5.7	5.4	4.5	4.5	7.1	6.8	4.6	6.6	5.6	5.2	6.6	4.7	5.7
6 QC	22.3	20.5	15.4	18.6	23.2	28.5	25.5	22.6	24.3	30.1	10.5	21.2	22.4
7 ON	7.3	8.2	6.4	9.4	7.7	3.1	6.8	8.5	10.0	8.0	3.4	2.4	7.3
8 US	4.2	6.3	6.5	6.3	7.7	7.7	7.2	6.2	9.8	7.0	1.5	7.6	6.5
9 OC	0.4	0.4	0.5	0.0	0.6	0.0	0.0	0.5	0.8	0.0	0.0	0.0	0.4
sum	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

```
INERTIAS AND PERCENTAGES OF INERTIA
-----------------------------------

 1 0.020017  41.08% ###################################################
 2 0.015374  31.55% #######################################
 3 0.006116  12.55% ###############
 4 0.003349   6.87% ########
 5 0.001804   3.70% #####
 6 0.001176   2.41% ###
 7 0.000724   1.49% ##
 8 0.000168   0.35%
 9 0.000000   0.00%
10 0.000000   0.00%
11-0.000000  -0.00%
   --------
   0.048729


CHI-SQUARE CONTRIBUTIONS
------------------------

          1    2    3    4    5    6    7    8    9   10   11   12

         sw   be   pi   fi   it   bi   hi   sg   bw   ns   bc   ca

 1 KE     4    1    6   16    6   41    6   18    9   10   31   22
 2 WS    11    2    7    0    2   25    1    1    0    0    1    3
 3 NO    47   13    0    4   10    1    8    0   16   14    1    7
 4 NB     0    7   25    8    1  192    2    2    5    8   15    0
 5 AT     0    1    5    0    8    2    3    4    0    1    1    1
 6 BC     0    5   52    1    1   18    7    0    3   48   31    0
 7 ON     0    4    3    1    0   25    1    5   16    1   10   22
 8 US    24    0    0    0    4    2    1    0   24    1   19    1
 9 OC     0    0    2    0    3    4    6    1    9    7    2    3

Chi-square statistic = 4873.87 (d.f.=  88)
```

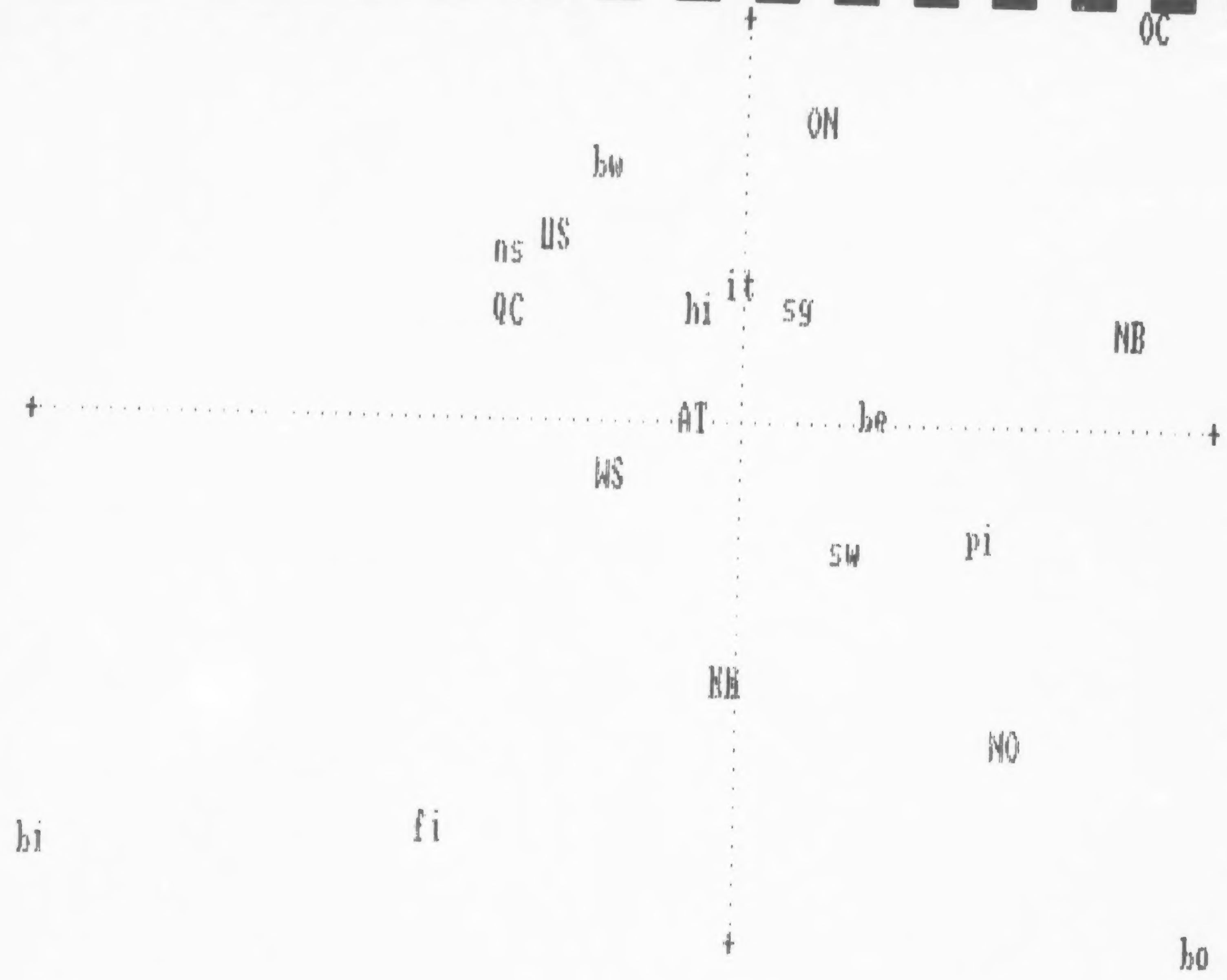
```
ROW CONTRIBUTIONS
-----------------

----+----+-------------+-------------+-------------+-------------+
  I¦ NAME¦ QLT MAS INR¦  k=1 COR CTR¦  k=2 COR CTR¦  k=3 COR CTR¦
----+----+-------------+-------------+-------------+-------------+
  1¦ KE  ¦ 964 260 169¦  -13   5   2¦ -171 923 495¦  -34  36  49¦
  2¦ WS  ¦ 402  89  52¦  -89 274  35¦  -32  37   6¦  -51  91  38¦
  3¦ NO  ¦ 940  31 120¦  167 148  43¦ -207 229  87¦  325 564 540¦
  4¦ NB  ¦ 972 197 265¦  241 885 572¦   65  64  54¦  -38  22  46¦
  5¦ AT  ¦ 162  57  26¦  -36  59   4¦    5   1   0¦   48 102  21¦
  6¦ QC  ¦ 896 224 165¦ -156 679 273¦   75 158  83¦   46  59  77¦
  7¦ ON  ¦ 804  73  88¦   41  29   6¦  201 680 190¦   75  95  67¦
  8¦ US  ¦ 823  65  77¦ -127 285  53¦  125 275  67¦ -122 262 160¦
  9¦ OC  ¦ 286   4  37¦  252 131  12¦  269 149  17¦   57   7   2¦
----+----+-------------+-------------+-------------+-------------+


COLUMN CONTRIBUTIONS
--------------------

----+----+-------------+-------------+-------------+-------------+
  J¦ NAME¦ QLT MAS INR¦  k=1 COR CTR¦  k=2 COR CTR¦  k=3 COR CTR¦
----+----+-------------+-------------+-------------+-------------+
  1¦ sw  ¦ 942 138  85¦   62 128  27¦  -81 218  59¦  134 597 406¦
  2¦ be  ¦ 844 166  33¦   79 637  51¦    7   5   0¦   44 202  53¦
  3¦ pi  ¦ 856 116 101¦  148 517 127¦  -73 126  40¦  -95 212 170¦
  4¦ fi  ¦ 534   6  30¦ -200 155  11¦ -268 290  27¦ -158  98  24¦
  5¦ it  ¦ 602  99  35¦   -8   4   0¦   94 516  57¦  -37  82  23¦
  6¦ bi  ¦ 980  52 310¦ -452 705 532¦ -282 274 269¦   20   1   3¦
  7¦ hi  ¦ 494  76  34¦  -34  54   4¦   78 280  30¦  -59 161  44¦
  8¦ sg  ¦ 731 128  32¦   28  66   5¦   82 544  56¦   39 122  31¦
  9¦ bw  ¦ 767  73  82¦  -95 166  33¦  172 540 140¦  -58  61  40¦
 10¦ ns  ¦ 781  88  88¦ -156 502 108¦  116 278  78¦    5   1   0¦
 11¦ bo  ¦ 924  24 110¦  292 377 101¦ -342 519 181¦  -79  27  24¦
 12¦ ca  ¦ 718  34  59¦  -12   2   0¦ -169 332  62¦ -182 384 182¦
----+----+-------------+-------------+-------------+-------------+
```

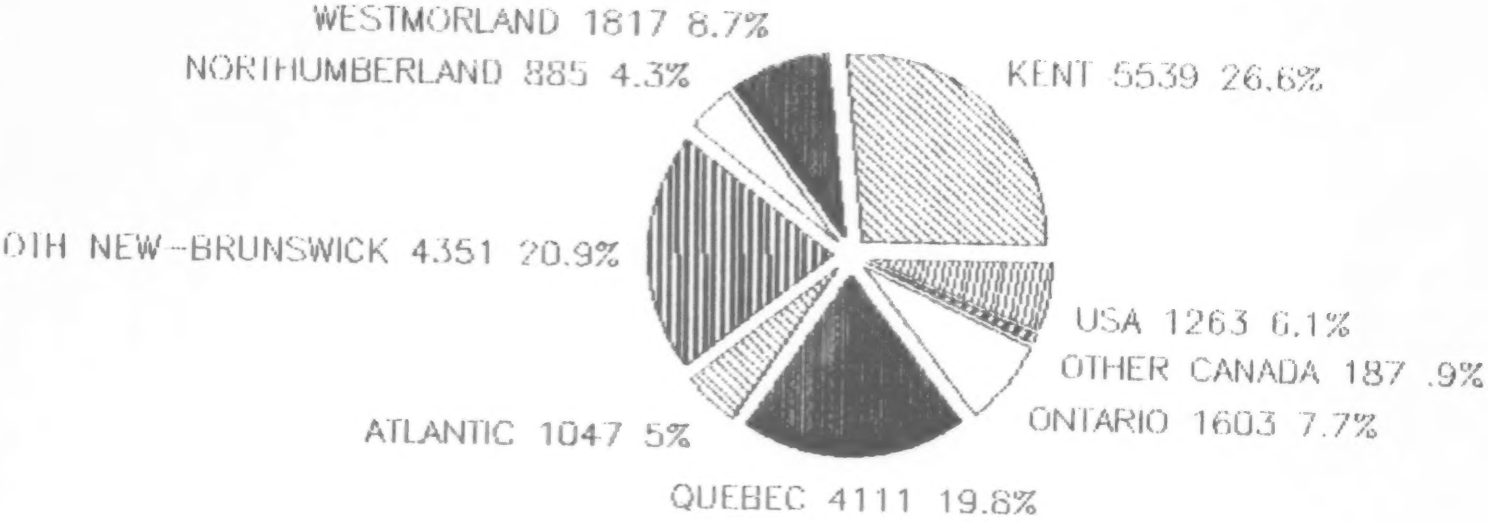
QLT: Quality
MAS: Mass
INR: Inertia
COR: Correlation
CTR: Contribution


OC
ON
bw
US
ns
QC
hi
it
sg
NB
AT
be
WS
sw
pi
NH
NO
hi
fi
bo

ORIGIN OF SUMMER PARTIES
(PIE SHAPED DIAGRAM)

CHAPTER 9

ORIGIN OF SUMMER PARTIES
(N=21426)



```
CODE1=SUBSTR(V10,1,3);
CODE2=SUBSTR(V10,1,1);
IF CODE2='A' THEN REGION='ATL';
IF CODE2='B' THEN REGION='ATL';
IF CODE2='C' THEN REGION='ATL';
IF CODE2='G' THEN REGION='QUE';
IF CODE2='H' THEN REGION='QUE';
IF CODE2='J' THEN REGION='QUE';
IF CODE2='K' THEN REGION='ONT';
IF CODE2='L' THEN REGION='ONT';
IF CODE2='M' THEN REGION='ONT';
IF CODE2='N' THEN REGION='ONT';
IF CODE2='P' THEN REGION='ONT';
IF CODE2='R' THEN REGION='OCDN';
IF CODE2='S' THEN REGION='OCDN';
IF CODE2='T' THEN REGION='OCDN';
IF CODE2='V' THEN REGION='OCDN';

IF CODE2='X' THEN REGION='OCDN';
IF CODE2='Y' THEN REGION='OCDN';
IF CODE1='ECA' THEN REGION='KENT';
IF CODE1='E1A' THEN REGION='WEST';
IF CODE1='E1B' THEN REGION='WEST';
IF CODE1='E1C' THEN REGION='WEST';
IF CODE1='E1E' THEN REGION='WEST';
IF CODE1='E1G' THEN REGION='WEST';
IF CODE1='E1N' THEN REGION='NRTH';
IF CODE1='E1V' THEN REGION='NRTH';
IF CODE2='E' AND (CODE1 NE 'ECA' AND CODE1 NE 'E1A' AND CODE1 NE 'E1B'
 AND CODE1 NE 'E1C' AND CODE1 NE 'E1E' AND CODE1 NE 'E1G' AND CODE1 NE
 'E1N' AND CODE1 NE 'E1V') THEN REGION='ONB';
IF V11 NE ' ' THEN REGION='USA';
IF V22=1 THEN CAMPERS=1;
IF VS3=1 OR VS4=1 OR VS5=1 THEN BEACH=1;
IF VS8=1 OR VS9=1 OR VS10=1 THEN PARK=1;
IF VS11=1 OR VS12=1 THEN NATURE=1;
IF VS6=1 OR VS13=1 OR VS14=1 THEN AQUATIC=1;
IF VS20=1 OR VS22=1 OR VS24=1 OR VS26=1 OR VS28=1 OR VS30=1 OR VS32=1
 THEN INTERP=1;
```

APPENDIX B

ECONOMIC IMPACT ANALYSIS

```
 [illegible]
 [illegible]=21;
 CODE1=SUBSTR(V10,1,3);
 [illegible]=SUBSTR(V10,1,1);
 [illegible] AND CODE1 NE 'E1A' AND CODE1 NE 'E1B'
 [illegible] CODE1 NE 'E1E' AND CODE1 NE 'E1G' AND CODE1 NE
 [illegible] 'E1V') THEN REGION='[illegible]';
 [illegible]=7 [illegible] THEN REGION='IL';
 [illegible] V3=13 [illegible] V3=13 THEN REGION='DCL';
 [illegible]='RCA';
 [illegible]7=1;
 [illegible]=SUM(EI11,EI12,EI13,EI14,EI15,EI16,EI17);



3        SAS(R) LOG    OS SAS 5.1-          VS2/MVS JOB 2016      STEP SAS
   IF [illegible]<15 THEN [illegible]=1;
   [illegible](EI21,EI21,EI22,EI23,EI24);
   [illegible]
   [illegible]='END DATE';

   ;
   PROC [illegible];
   [illegible]
   [illegible] DEC NUIT;
NOTE: [illegible]
NOTE: SAS [illegible] 0.71 SECONDS AND 240K AND PRINTED PAGES 1 TO 9
NOTE: SAS INSTITUTE INC.
      SAS CIRCLE
      PO BOX 8000
      CARY, N.C. 27512-8000
```

ROLLCALL SURVEY

The first variable is about the number of times, the party showed up for Roll Calls. Most of them 64.9% showed up one time only as indicated in table 1.

TABLE 1
FREQUENCIES FOR THE NUMBER OF TIMES THE PARTY SHOWED UP FOR ROLL CALLS
(N=1983)

TIMES	NUMBER OF VISITORS	% OF VISITORS
Never	357	18.0%
Once	1287	64.9%
Twice	336	16.9%
Three times or more	3	0.1%

Different methods can be used for campsite allocation. Most of the visitors prefered either the "First-come first served" method, or a combination of "First-come first served" with a reservation system. (see table 2).

TABLE 2

EVALUATION OF SITE ALLOCATION METHOD

ALLOCATION METHODS	% OF VISITORS	% OF VISITORS FROM CAMPGROUND SURVEY
1. First-come first-served	51.2%	56.5%
2. Reservations	4.0%	3.0%
3. Combination of both 1 and 2	38.3%	36.7%
4. Other	6.4%	3.8%

The last interesting information that can be drawn from this survey is the satisfaction level of visitors with the Roll Call allocation system. 60% of the visitors are satisfied, whereas only 18.5% of them are dissastified. There are three times as many satisfied visitors as dissatisfied visitors with the Roll Call system (see table 3).

TABLE 3

SATISFACTION LEVEL WITH THE ROLL CALL SYSTEM

SATISFACTION LEVEL	% OF VISITORS	
1. Very satisfied	27.8%	60% (satisfaction)
2. Satisfied	32.2%	
3. Neither satisfied nor disatisfied	21.5%	
4. Dissatisfied	9.2%	18.5% (dissatisfaction)
5. Very dissatisfied	9.3%	
	100.00%	

APPENDIX C

WINTER MARKET DETAILED ANALYSIS

JUSTIFICATION FOR THE SELECTION OF SEGMENTATION BASES

CHAPTER 1

1.0 JUSTIFICATION FOR THE SELECTION OF SEGMENTATION BASES

The four main dimensions to be considered in the winter survey are the following:

1. Time of the visit (day time/ evening; week days/week ends).

2. Geographical origin of visitors.

3. Main activity: cross-country skiing.

4. Time spent in the park.

1.1 Time of the visit

Two distinct aspects have been considered in the analysis:

- day time visitors whose variables have been previously weighted in the computer program to extrapolate the figures to the real population visiting the park (N=4856)
  - 1852 day time visitors came during week-days (38%).
  - 3004 visitors came during the weekend (62%).
- evening visitors whose variables remained unweighted so that the analysis is this time based on the sample and not on an expansion to the whole population (N=110, that is 14.5% of the whole sample of 760).
  (In this case, the subdivision between week days and week ends for evening visitors is not relevant because of the low number of evening visitors)

Thus, in order to compute the relative size of these three subgroups of visitors, it was necessary to use the unweighted data. The following table shows that day time visitors during the weekend account for 52.9% of the total.

RELATIVE SIZE OF THE TOTAL SAMPLE (N=760) AS A FUNCTION OF TIME OF THE VISIT

	DAYTIME VISITORS		EVENING	TOTAL
	WEEK DAYS	WEEKENDS		
Number of visitors (unweighted)	248	402	110	760
%	32.6%	52.9%	14.5%	100%

1.2 Geographical origin of visitors

For the purpose of geographical segmentation of park visitors, certain groupings within variables were necessary. Previous results, as regards frequencies, showed 18 different geographical origine. The suggested segmentation basis (Kent, Westworland, other New-Brunswick, other markets) was not balanced enough because the Kent region accounted for 79% of the total day time visitors. In order to get a better knowledge of park visitors, the county of Kent was divided into three areas according to their proximity with the park entrance. The following table indicate the three subdivisions of the county of Kent.

DISTANCES BETWEEN TOWNS IN THE COUNTY OF KENT AND THE PARK ENTRANCE

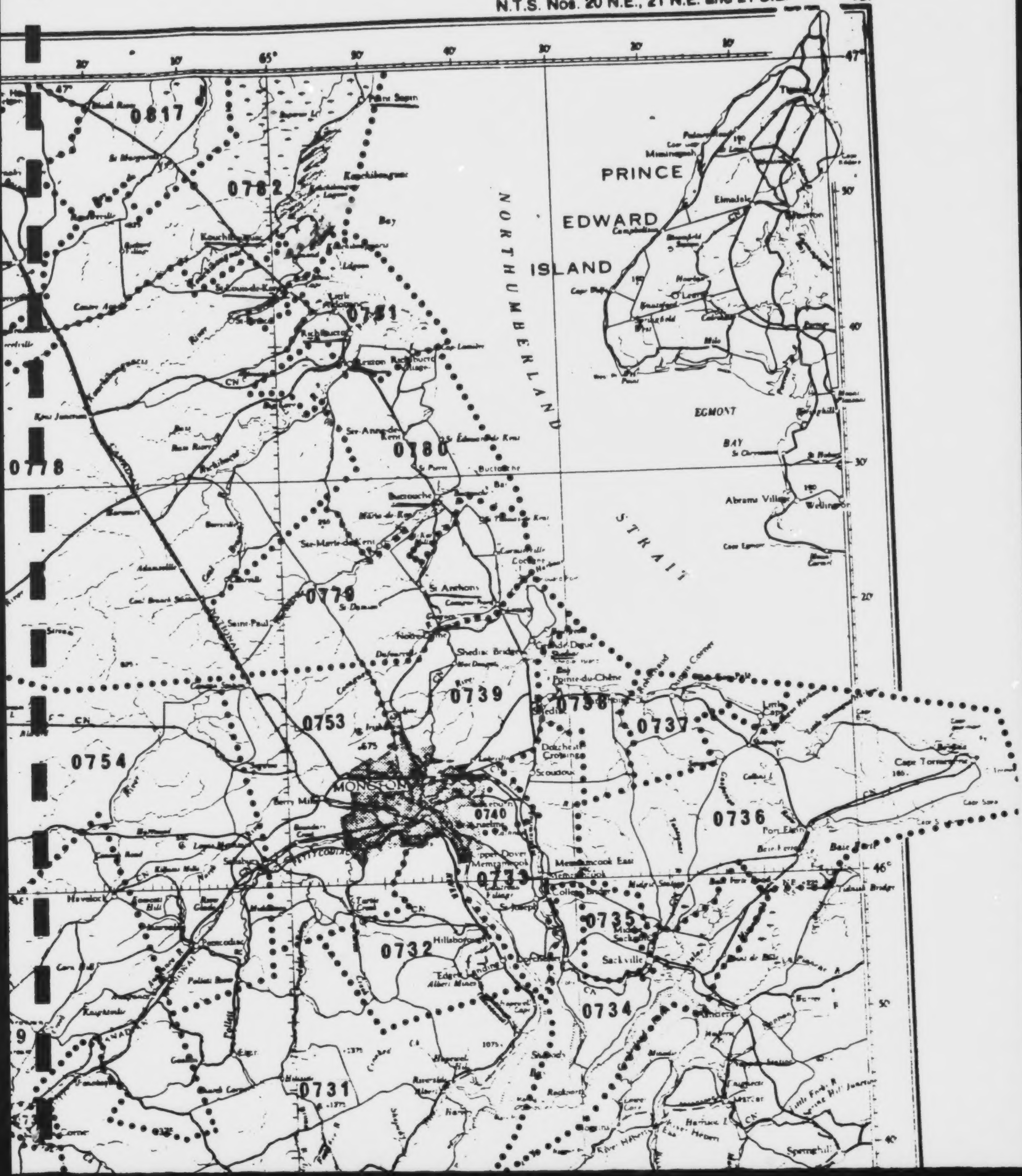
DISTANCES TOWNS *	UNDER 10KM KENT 1	10 TO 25KM KENT 2	MORE THAN 25KM OTHER KENT
Kouchibouguac	X		
St Louis de Kent	X		
Richiboucto		X	
Rexton		X	
Pointe Sapin		X	
Buctouche			X
St. Antoine			X
Other Kent			X

* See location of towns on the map enclosed.

Since 98.6% of the day time visitors came from New Brunswick, it was decided to drop the other markets from the analysis.

According to the suggested geographical segmentation, New Brunswick visitors (except those from Kent county) were subdivided into Westmorland county on the one hand and other counties of New Brunswick on the other.

Fredericton — Moncton and Yarmouth — Windsor
N.T.S. Nos. 20 N.E., 21 N.E. and 21 S.E.


47°
20'
10'
65°
50'
40'
30'
20'
10'
0817
0782
0781
0780
0778
0779
0753
0739
0738
0737
0754
0740
0736
0733
0735
0732
0734
0731
PRINCE
EDWARD
ISLAND
NORTHUMBERLAND
STRAIT
EGMONT
BAY
Bay
Kouchibouguac
Richibucto
Ste-Anne-de-Kent
St Edouard-de-Kent
Buctouche
Ste-Marie-de-Kent
St Anthony
Saint-Paul
Shediac Bridge
Pointe-du-Chêne
Shediac
Dorchester Crossing
Scoudouc
MONCTON
Berry Mills
Lakeville
Irishtown
Notre Dame
Cocagne
Memramcook East
Memramcook
College Bridge
St Joseph
Upper Dover
Hillsborough
Salisbury
Petitcodiac
Havelock
Dorchester
Sackville
Middle Sackville
Port Elgin
Baie Verte
Cape Tormentine
Amherst
Springhill
River Hébert
Abrams Village
Wellington
Summerside
Miminegash
Alberton
Tignish
Elmsdale
Cape Egmont
Cape Wolfe
CN
CA
46°
50'
40'
30'
20'
10'
40'

DESCRIPTION OF THE TWO AREAS
(WESTMORLAND, OTHER NEW BRUNSWICK)

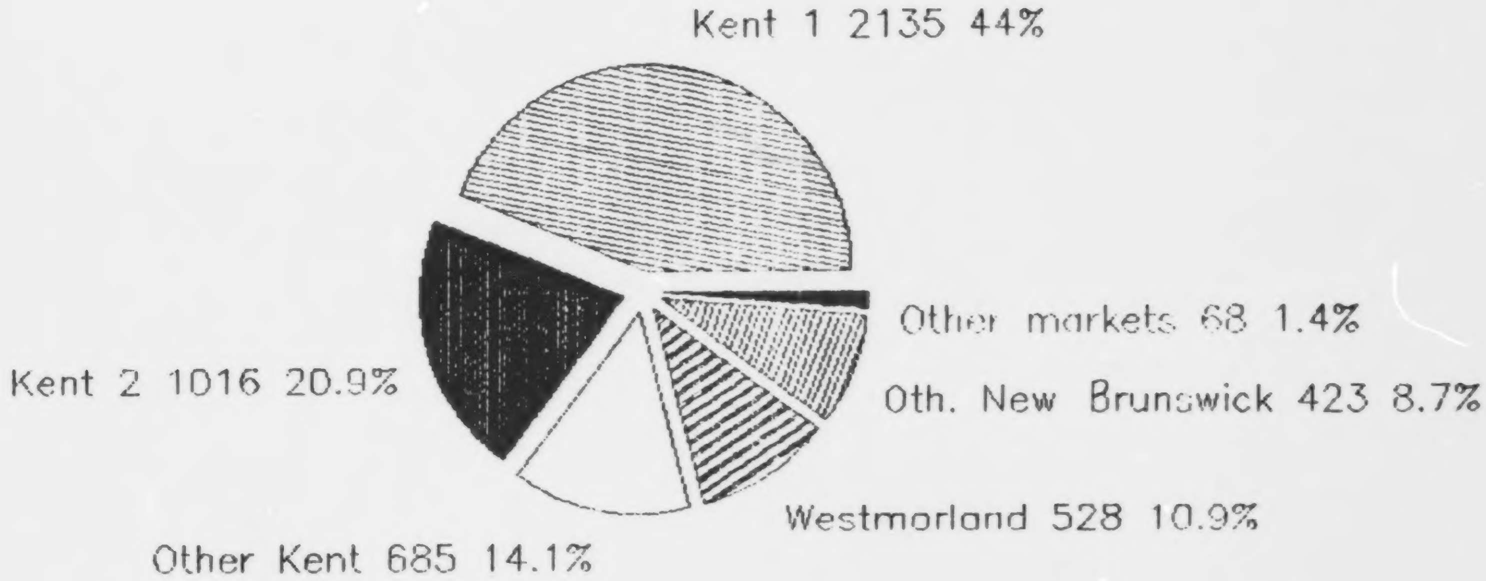
WESTMORLAND	OTHER NEW BRUNSWICK
. Moncton . Shediac	. Chatham (Northumberland county) . Newcastle (Northumberland county) . Bathurst (Gloucester county) . Other New Brunswick

The relative size of day time visitors according to this new subdivision is indicated in the following table:

RELATIVE SIZE OF DAY TIME VISITORS (N= 4856) AS A FUNCTION OF ORIGIN

	NUMBER OF VISITORS (WEIGHTED)	%
Kent 1	2135	44.0%
Kent 2	1016	20.9%
Other Kent	685	14.1%
Westmorland	528	10.9%
Other New Brunswick	423	8.7%
		98.6%
Omitted	68	1.4%
TOTAL	4856	100%

ORIGIN OF WINTER DAY–TIME VISITORS



1.3 Main activity in the park during the winter season: cross-county skiing

The problem highlighted in the analysis of the geographical origin (79% of the visitors coming from Kent county) has appeared once again for the activity variables. Indeed, 77% of the day-time visitors came to the park mainly for cross-country skiing.

Since 4 visitors out of 5 day time visitors came to the park for skiing, it has been decided to focus a part of the analysis on the skiers population only. This population has been subdivided into four classes depending on their monthly frequency of skiing:

- 1 to 5 times per month
- 6 to 10 times per month
- 11 to 15 times per month
- more than 15 per month

When considering responses to question 6)a), (in the winter survey questionnaire), 3747 visitors came to the park for skiing. However, only 3675 skiers answered to section B of the questionnaire. Thus, further analysis will consider only these 3675 responding skiers.

Among this population, the appropriate frequency are described below:

DESCRIPTION OF THE DAY-TIME SKIERS POPULATION (N=3675)
AS A FUNCTION OF THEIR MONTHLY FREQUENCY OF SKIING

	NUMBER OF SKIERS (WEIGHTED)	%
1 to 5 times/month	1637	44.5%
6 to 10 times/month	685	18.6%
11 to 15 times/month	338	9.2%
more than 15 times/month	1015	27.6%
SUM	3675	100%

1.4 Time spent in the park

The fourth relevant dimension that has been included in the segmentation analysis concerns the length of the visit. Once again, it has been necessary to form classes because of the large diversity of the previously presented frequency results. Five categories emerged:

- less than 1 hour visit
- (1h00 - 1h30)
-)1h30 - 2h)
-)2h - 3h)
- more than 3 hours.

This classification has been selected in so far as each category is nearly balanced (about 1/5 of the day time visitors in each category):

DESCRIPTION OF THE DAY TIME VISITORS (N=4856) AS A FUNCTION OF THE TIME THEY SPENT IN THE PARK.

	NUMBER OF VISITORS (WEIGHTED)	%
Less than 1h	718	14.8%
(1h. - 1h.30)	1296	26.7%
)1h30 - 2h)	1144	23.6%
)2h -3h.)	986	20.3%
more than 3h	713	14.7%
TOTAL	4856	100%

These four dimensions are essential to proceed with a useful segmentation analysis. They constitute four relevant segmentation bases that are presented in detail in the following sections.

CLASSIFICATION OF VARIABLES FOR SEGMENTATION ANALYSIS

CHAPTER 2

2.0 CLASSIFICATION OF VARIABLES FOR SEGMENTATION ANALYSIS

Regarding the previous frequency results, only a few variables have been chosen. By the same token answers to questions have been eliminated, because of low frequencies.

Two kinds of global variables have been identified:

- Activity variables: "what did visitors do, where and when"?
- Descriptive variables: "the visitors who are they "?

2.1 Activity variables

2.1.1 Main activity

The selected answers are those of the second columns of the following table, as compared to those mentioned in the previous frequency analysis (first column):

TYPE OF ACTIVITY PREVIOUSLY PRESENTED (N=4856)		TYPE OF ACTIVITY SELECTED (N=4856)	
- Skiing :	77.2%	- Unfrequent skiers: (1 to 5 times per month)	34.4%
- Snow-shoeing :	0.8%	- Frequent skiers : (more than 5 times per month)	42.8%
- Interpretive programs :	0.1%	- Sightseeing : (including "just for a drive")	20.8%
- Sightseeing :	17.6%		
- Just for a drive:	3.2%		
- Other :	1.1%	(omitted) :	2.0%
	100%		100%

24.1.2 Services

The service offered in the park that were kept in our analysis are:

- the Reception Centre (used or not)
- the waxing chalet (used or not)
- the restaurant (used or not, and otherwise what alternative?
  - . own lunch brought
  - . no lunch
- the shelters (used or not by the skiers) only four shelters have been considered (no skiers used Ryans shelter).

4.1.3 Time of the visit

This variable can only be applied to day time visitors and comprises:

- week days visitors: 38%

(N=4856)

- weekends visitors: 62%

2.1.4 Time spent in the park

(see paragraph 3.4)

2.1.5 Number of visits planned for the winter

This variable concerned 88% of the day time visitors, since respondents were not asked question 3b) if they answered "yes" to question 3a) (Is this your first visit to Kouchoubouguac National Park this winter?). The amount of 4265 visitors has been considered substantial enough to be included in the analysis.

Five nearly balanced classes have been formed.

-	1 to 5 visits planned for the winter	16.4%
-	6 to 10 visits planned for the winter	17.6%
-	11 to 20 visits planned for the winter	18.0%
-	21 to 50 visits planned for the winter	18.9%
-	More than 50 visits planned for the winter	17.1%
-	No answer (omitted since it is a first visit)	12.0%
		100.00%

2.1.6 Other activity variables applicable to skiers only

- Number of kilometers skied.

The previous frequency analyses spreaded the answers into 25 different classes. It has been decided to group then into 3 classes:

.	1 to 5 kilometers skied	36.9%
.	6 to 10 kilometers skied	40.2%
.	More than 10 kilometers skied	22.9%
		100.00%

Skiing in other areas

According to the geographical classification, where only people from New Brunswick have been considered, the answers relative to regions outside New Brunswick (Maritimes and other Canada) have been omitted.

. Kent Region	38.2%
. Moncton Region	24.6%
. Other New Brunswick	27.8%
	90.6%
. Omitted (outside N B)	9.4%
	100.00%

DESCRIPTIVE VARIABLES CHAPTER 3

3.0 DESCRIPTIVE VARIABLES

Only four relevant personal variables have been included in the analysis to determine park visitors profiles.

3.1 Geographical origin

(see paragraph 3.2)

3.2 Party composition

As described in the questionnaire, the party composition is defined as:

- Family with children : 16.9%
- Group of friends : 20.7%
- Alone : 32.4%
- Couple : 28.5%
- Omitted (others) : 1.4%

3.3 Number of visitors in each party

Three classes have been chosen:

-	2 persons	43.9%
-	3 persons	11.5%
-	4 persons and more	11.8%
		67.2%
-	1 person (omitted)*	32.8%
		100.00%

* This is the same as "alone" in party composition (the difference between 32.8% and 32.8% is accounted for by missing (responses).

The answer "one person" (to number in party) is indeed a duplicate since it is the same as "Alone" in the question relative to party composition at the beginning of the questionnaire.

3.4 Number of children under 12 years old

This aspect of the visitors profile could have been very interesting as regards strategic orientations of the park activities (development of activities designed for young people)

However, the survey results indicated that 84.5% of the day time visitors came in the park without any child under 12 years old. This is the reason why only the alternative: with or without children under 12" has been taken into account.

Number of children under 12 years old in day time party:

none	:	84.5%
one or more	:	15.5%
		100.00%

SEGMENTATION ANALYSIS BASED ON GEOGRAPHICAL ORIGIN OF DAY TIME WINTER VISITORS

CHAPTER 4

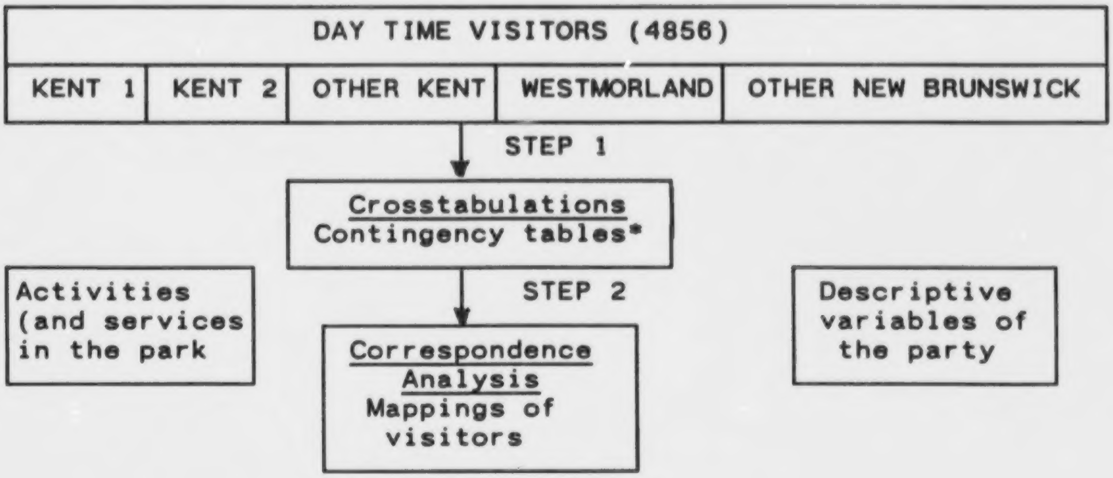
4.0 SEGMENTATION ANALYSIS BASED ON GEOGRAPHICAL ORIGIN OF DAY TIME WINTER VISITORS

As mentioned above, the origin variable has been subdivided into five categories:

- Kent 1, including St Louis de Kent, Kouchibouguac;
- Kent 2, including Richiboucto, Rexton and Pointe Sapin;
- Other Kent, including Buctouche, St Antoine;
- Westmorland, including Moncton and Shediac;
- Other New Brunswick, including Bathurst, Newcastle, Chatham.

Thus, the winter day time visitors have been considered in relation to their origin: they represent a population of 4856 visitors (weighted figures). Then, the visitors origin has been studied as far as activities, and descriptive variables are concerned. For both considerations, two complementary analysis have been performed: crosstabulations, and correspondence analyses:

SEGMENTATION PROCESS BASED ON GEOGRAPHICAL ORIGINS OF VISITORS


DAY TIME VISITORS (4856)
KENT 1
KENT 2
OTHER KENT
WESTMORLAND
OTHER NEW BRUNSWICK
STEP 1
Crosstabulations
Contingency tables*
Activities (and services in the park
STEP 2
Descriptive variables of the party
Correspondence Analysis
Mappings of visitors

* contingency tables are presented in table 1 (for activities) and table 2 (for descriptive variables)

** mappings of visitors are presented in figure 1 (for activities) and figure 2 (for descriptive variables)

4.1 Cross tabulations of origin by activities and by party composition (a priori segmentation)

The first step of the analysis consisted of crosstabulations between origin and:

- activity variables: activities, services used in the park, time of the visit, time spent in the park, and number of visits planned for the winter.

TABLE 1

WINTER DAY VISITORS (WEIGHTED) BY ORIGIN AS A FUNCTION OF ACTIVITIES

ORIGIN ACTIVITIES	KENT 1 (St-Louis de Kent Kouchibouguac)	KENT 2 (Richibucto, Rexton, Pointe Sapin	OTHER KENT (Buctouche, St-Antoine etc.)	WESTMORLAND (Moncton, Shediac)	OTHER NEW BRUNSWICK Bathurst, NewCastle Chatham, etc.)
Activities (N=4856)					
. Skiing (1-5times/month)	369*	343	321	332	240
. Skiing (+5times/month)	1127	456	233	116	91
. Sightseeing	561	174	115	80	56
Services (N=4856)					
. Reception Centre	109	28	28	116	94
. Waxing chalet	560	367	263	223	146
. Restaurant	17	7	28	42	22
. Own lunch brought	341	362	253	357	238
. Non lunch	732	384	300	122	142
Time (N=4856)					
. Week days	1118	342	200	100	58
. Weekends	1018	674	484	428	365

* 369 day visitors from Kent county subdivision 1 have been cross country skiing 1 to 5 times during an average month.

TABLE 1 (continued)

WINTER DAY VISITORS (WEIGHTED)

BY ORIGIN AS A FUNCTION OF ACTIVITIES

(N= 4856)

ORIGIN ACTIVITIES	KENT 1 (St-Louis de Kent Kouchibouguac)	KENT 2 (Richibucto, Rexton, Pointe Sapin)	OTHER KENT (Buctouche, St-Antoine etc.)	WESTMORLAND (Moncton, Shediac)	OTHER NEW BRUNSWICK Bathurst, NewCastle Chatham, etc.)
Time spent in the park (N=4856)					
. less than 1 h	383	154	73	42	50
. 1 h - 1 h30	725	290	161	36	77
. 1 h30 - 2 h	486	283	178	111	80
. 2 h - 3 h	388	208	186	87	108
. More than 3 h	154	81	87	252	108
Number of visits planned (N=4856)					
. 1 to 5 for the winter	126	139	162	217	150
. 6 to 10 for the winter	295	226	148	50	100
. 11 to 20 for the winter	380	273	171	98	22
. 21 to 50 for the winter	579	242	74	0	22
. More than 50	693	116	21	0	0

TABLE 2

WINTER DAY VISITORS (WEIGHTED) BY ORIGIN AS A FUNCTION OF DESCRIPTIVE VARIABLES

ORIGIN ACTIVITIES	KENT 1 (St-Louis de Kent Kouchibouguac)	KENT 2 (Richibucto, Rexton, Pointe Sapin)	OTHER KENT (Buctouche, St-Antoine etc.)	WESTMORLAND (Moncton, Shediac)	OTHER NEW BRUNSWICK Bathurst, NewCastle Chatham, etc.)
Party composition (N=4856)					
.Family with kids	219	186	150	147	121
. Group of friends	292	253	178	122	115
. Alone	1055	250	169	50	66
. Couple	549	311	187	209	107
Number in party (N=4856)					
. 2 persons	795	527	332	272	177
. 3 persons	196	146	87	45	87
. 4 persons and more	90	93	97	161	94
Children under 12 years (N=4856)					
. None	1955	843	556	388	293
. One or more	180	172	128	140	130

- descriptive variables: party composition, number of persons in the party, and number of children under 12 years old.

These two sets of crosstabulations, indicate the number of people coming from different origins in relation to activities in the park, and party composition.

Analysis of these tables helps to understand the main tendencies and lead to these conclusion:

- The more visitors live close to the park (Kent 1 is the nearest area), the more they tend to come frequently for cross country skiing, at the most for 2 hours (especially during the week) and they do not use services very much, except the waxing chalet.
- Besides, it appears that the more visitors live close to the park, the more they tend to come alone, or in couple, but without kids.

The examination of contingency tables is however difficult when several rows and columns are examined simultaneously. Further analysis of table 1 and 2 can be performed with correspondence analysis. The procedure will allow us to compare all row and column profiles of each table in a space of low dimensions. The percentage of observations in each row and column is weighted by the rows and columms totals to derive comparable profiles.

4.2 Mappings of market segments (a posteriori segmentation)

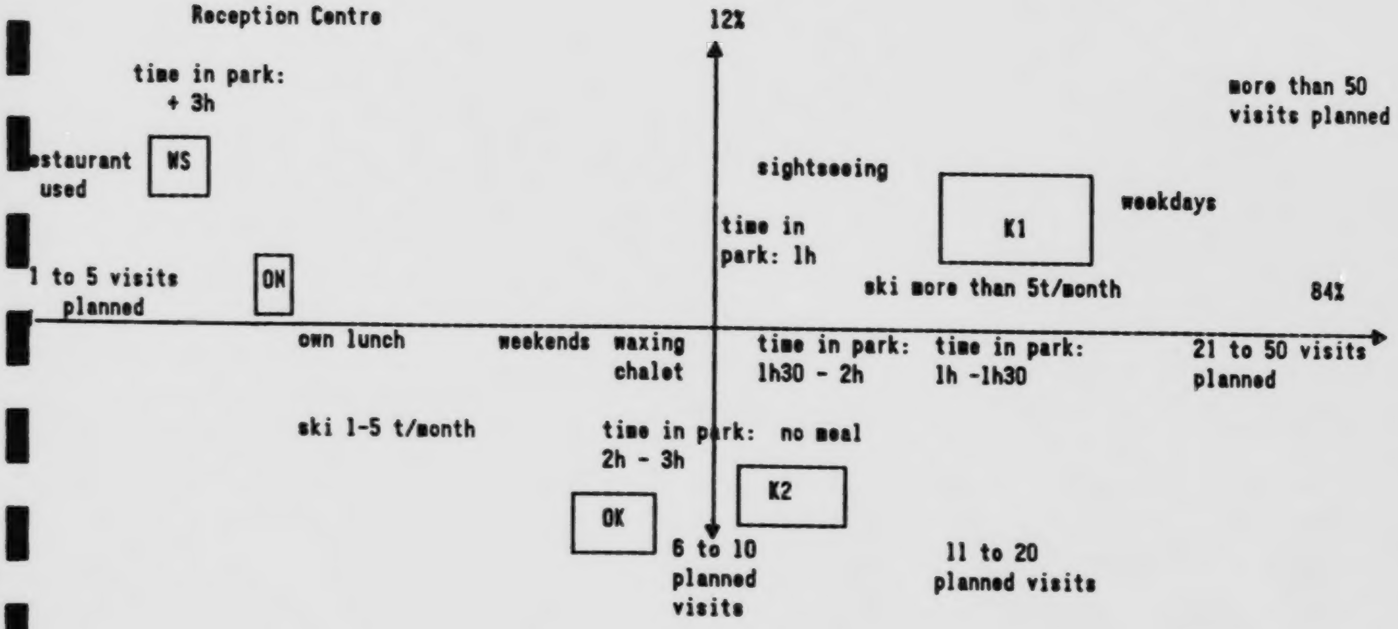
Correspondence analysis was applied first to table 1 with activities as row variables and then to table 2 with descriptive variables as row variables.

Results on figure 1 are interpreted as follows:
Market segments are indicated by capital letters within a square the size of which is proportional to the relative market segment size as percent of party visitors. Activities and services used are indicated on the map within various proximities of market segments. The closer an activity or a service to a segment, the more representative the activity of the segment. For example party visitors from Centre Kent (K1) are more likely to be in the park during weekdays to ski more than 5 times/month, to stay in the park 1h. etc. On the other hand, party visitors from Westmorland (WS) will be more likely to stay in the park more than 3 hours, to use the restaurant and the Reception Centre (they however represent only 11% of party visitors as compared to 44% for Centre Kent).

The horizontal and vertical axes are the underlying structural dimensions of the market and must be derived a posteriori with the examination of the relative position of the rows and columns points in the figure. An important information is the percentage of weighted variance accounted by each axis. This percentage is an indication of the relative spread of the data along the axis and therefore reveals the relative importance of the underlying dimension. In figure 1, the horizontal axis accounts for 84% of weighted variance and appears to represents an increasing geographical closeness to the park entrance from left to right. The vertical axis accounts for only 12% of weighted variance and does not lend itself to a clear interpretation. This lack of clear significance is not a problem since the second dimension is considerably less important than the first.

An additional feature of correspondence analysis is that the closer the points are from the center of the figure, the more similar the associated row or column profile to the average

FIGURE 1: MAPPING OF PARTY VISITORS ACCORDING TO ORIGIIN RELATION TO ACTIVITIES AND SERVICES USED



LEGEND	
	% of party visitors
K1: Centre Kent	44%
K2: Middle Kent	20.9%
OK: Other Kent	14%
WS: Westmorland	11%
ON: Other New Brunswick	9%

profile. In other words the closer market segments (or activities) are to the centre of the figure, the more typical the segments (or activities). For example, market segment K2 (Middle Kent) is closer to the centre than WS (Westmorland) and therefore K2 is more typical of the average segment profile than WS. The same explanation applies to activities and services used. For example: "time in park: 2h - 3h" has a profile on various market segments that is closer to the average than: "time in park: + 3h."

The market structure emerging from figure 1 is strongly related to the origin of party visitors and the park entrance. A more detailed examination of figure 1 allows us to identify the following three market segments with their average associated characteristics:

1. Visitors from Centre Kent (K1)

- coming during weekdays for a visit of 1h30 at most
- coming to the park either for sightseeing or for cross-country skiing as frequent skiers (more than 5 times/month).
- do not use services such as the Reception Centre or the restaurant
- planning to come at least 20 times during the winter season.

2. Visitors from Middle Kent (K2)and other Kent (OK)

- coming to the park during weekends and for 1h30 to 3h.
- using the waxing chalet but neither the restaurant nor the Reception Centre.
- planning to come 11 to 20 times (Middle Kent) or 6 to 10 times (other Kent) during the winter season.

3. Visitors from Westmorland (WS) and other New Brunswick (ON)

- coming to the park for cross country skiing but not used to skiing frequently.
- spending more than three hours in the park.
- using the restaurant (Westmorland) or bringing their own lunch (other New Brunswick)
- using the Reception centre
- planning to come to the park 1 to 5 times for the winter season.

Results on figure 2 are interpreted in the same manner. The three market segments structure is confirmed with the distance from the park entrance beeing a major underlying dimension (90% of weighted variance). As regards party composition, the three segments profiles can be identified as follows:

1. Visitors from Centre Kent (K1)

- tend to be alone
- without any children under 12 in the party.

2.- Visitors from Middle Kent (K2) and other Kent (OK)

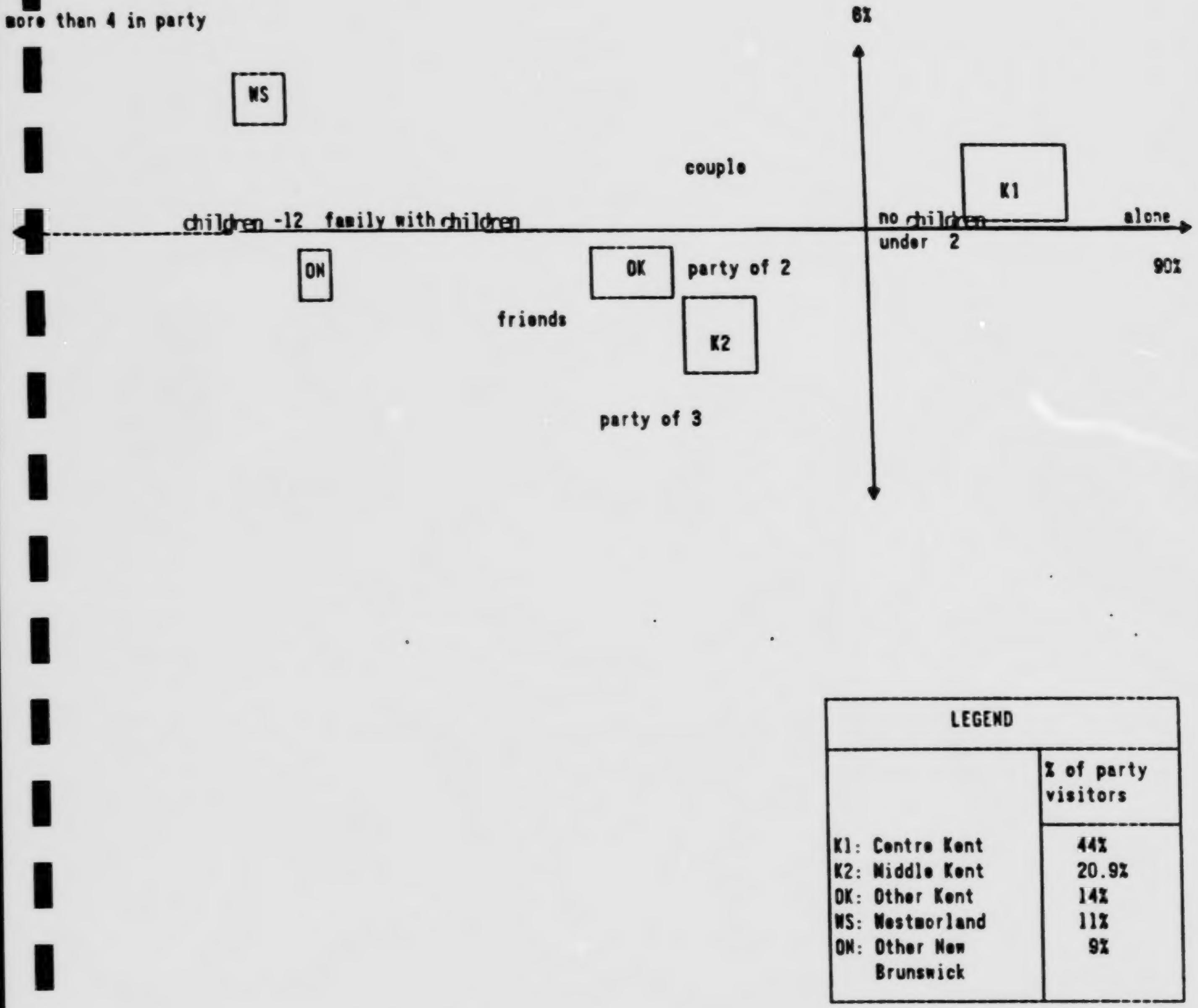
- tend to be couples or friends, in groups of 2 or 4 visitors.
- with no children under 12 in the party.

3- Visitors from Westmorland (WS) and other New Brunswick (NB)

- tend to be families with kids (mostly under 12)
- groups of 4 or more in the party.

FIGURE 6

MAPPING OF WINTER PARTY VISITORS ACCORDING TO ORIGIN IN RELATION TO GROUP COMPOSITION



In both cases, the dominant underlying dimension is the distance to the park entrance and the length and frequency of visits appear logically inversely related to that distance (see figure 1).

4.3 Crosstabulations of winter day visitors weighted in the park as a function of activities

Table 3 presents the weighted frequencies of day time visitors by time spent in the park as a function of activities. As can be seen in the table, time spent in the park is inversely related to frequency of skiing per month and to the distance from the entrance to the park. Figure 3 presents the associated mapping to be interpreted in a similar manner than figures 1 and 2. The underlying market structure revealed by figure 3 is similar to the one in the previous figures. Direction of the horizontal axis on figure 3 indicates the same underlying market structure. Positions of the points are very similar with frequent users associated with centre Kent (Kent 1) on the left and less frequent visitors from Westmorland and other New Brunswick on the left.

4.4 Crosstabulations of winter day visitors (weighted) by time spent in the park as a function of descriptive variables.

Table 4 presents the weighted frequencies of visitors by time spent in the park as a function of descriptive variables. Time spent in the park is inversely related to origin. Thus, party composition is similar to the results presented in the mapping of figure 2. Therefore, the specific mapping for table 4 is not presented.

TABLE 3

WINTER DAY VISITORS (WEIGHTED) BY TIME SPENT IN THE PARK AS A FUNCTION OF ACTIVITIES

TIME SPENT IN THE PARK ACTIVITIES	LESS THAN 1h.	1h.-1h.30	1h.30 - 2h.	2h.- 3h	MORE THAN 3h.
Activities (N=4856)					
Skiing (1-5 times/ month)	29	319	484	416	388
Skiing (+ 5 times/ month)	47	548	564	563	316
Sightseeing	566	369	64	0	8
Services (N=4856)					
. Reception Centre	91	29	91	72	122
. Waxing chalet	31	237	536	430	348
. Restaurant	7	22	43	15	35
. Own lunch brought	81	232	334	472	456
. No lunch	518	533	379	178	101
Time (N=4856)					
Weekday	234	517	484	417	200
Week End	484	779	660	569	512

TABLE 3 (continued)

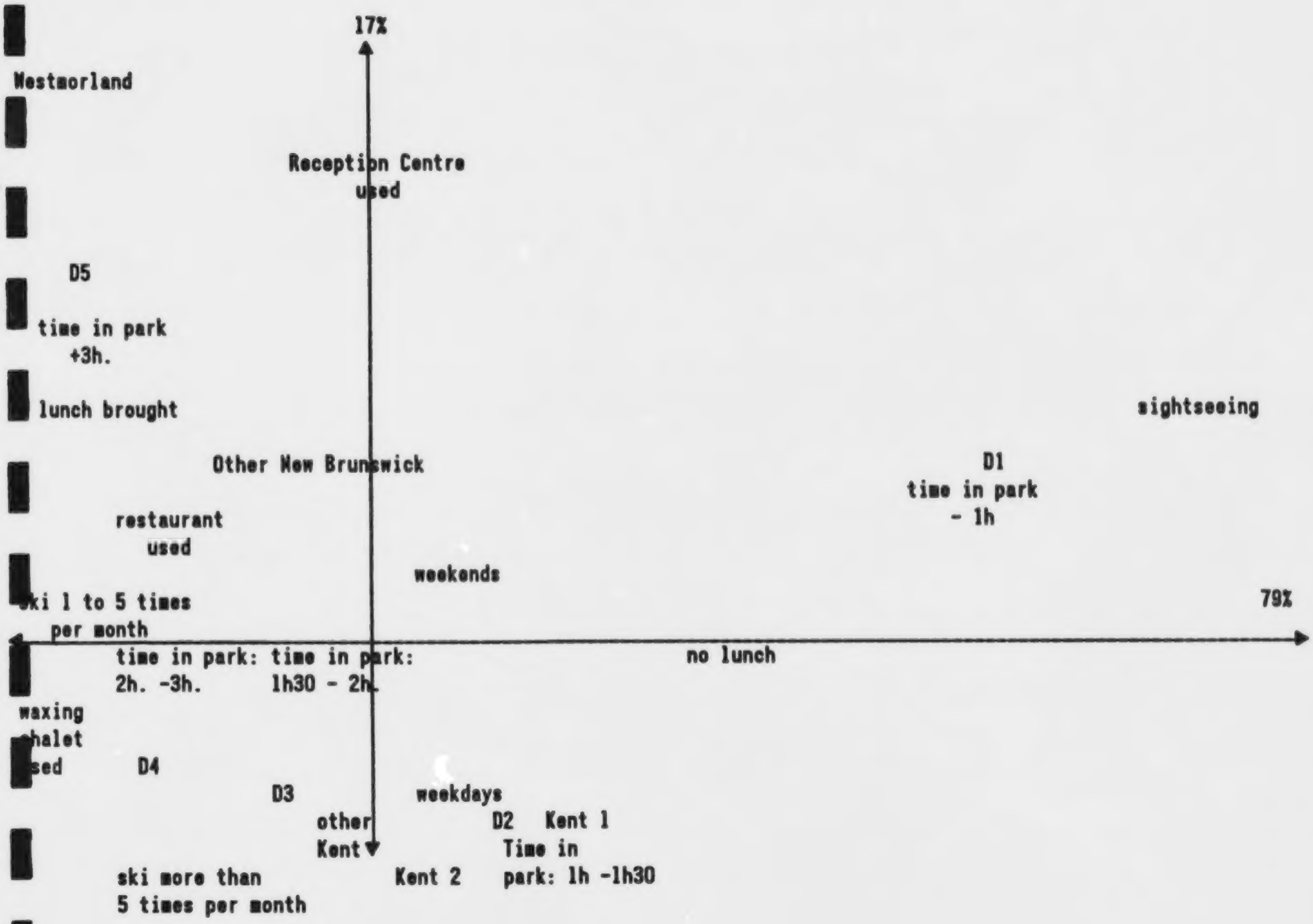
WINTER DAY VISITORS (WEIGHTED) BY TIME SPENT IN THE PARK AS A FUNCTION OF ACTIVITIES

(N= 4856)

TIME SPENT IN THE PARK ACTIVITIES	LESS THAN 1h.	1h. - 1h30	1h.30 - 2h.	2h. - 3h.	MORE THAN 3h.
Origin					
. Kent 1	383	725	486	388	154
. Kent 2	154	290	283	208	81
.Other Kent	73	161	178	186	87
.Westmorland	42	36	111	87	252
.Other New-Brunswick	50	77	80	108	108

FIGURE 3: MAPPING OF PARTY VISITORS ACCORDING TO TIME SPENT

THE PARK IN RELATION TO ORIGIN, ACTIVITIES AND SERVICES USED



LEGEND	%of party visitors
D1: Less than 1h. spent in the park	14.8%
D2: (1h. -1h30) spent in the park	26.7%
D3: (1h.30 - 2h.) spent in the park	23.6%
D4: (2h. - 3h.) spent in the park	20.3%
D5: More than 3h. spent in the park	14.7%

TABLE 4

WINTER DAY VISITORS (WEIGHTED) BY TIME SPENT IN THE PARK AS A FUNCTION OF DESCRIPTIVE VARIABLES

TIME SPENT IN THE PARK DESCRIPTIVES VARIABLES	LESS THAN 1h.	1h. - 1h.30	1h.30 - 2h.	2h. - 3h.	MORE THAN 3h.
Origin (N=4856)					
.Kent 1	383	725	486	388	154
.Kent 2	154	290	283	208	81
.Other Kent	73	161	178	186	87
.Westmorland	42	36	111	87	252
.Other New-Brunswick	50	77	80	108	108
Party composition (N=4856)					
.Family with kids	140	151	192	179	160
.Group of friends	162	255	285	193	110
.Alone	232	539	427	250	134
.Couple	183	337	317	347	202

TABIE 4 (continued)

WINTER DAY VISITORS (WEIGHTED) BY TIME SPENT IN THE PARK AS A FUNCTION OF DESCRIPTIVE VARIABLES

TIME SPENT IN THE PARK DESCRIPTIVES VARIABLES	LESS THAN 1h.	1h. - 1h.30	1h.30 - 2h.	2h. - 3h.	MORE THAN 3h.
Number in party (N=4856)					
.2 persons	316	597	498	427	296
.3 persons	104	80	123	176	77
.4 persons and more	66	80	95	125	206
Children under 12 (N=4856)					
.None	620	1174	965	754	589
.One or more	98	122	178	231	123

4.5 Crosstabulations of day time cross-country skiers (weighted) by frequency of skiing as a function of activities.

Table 5 presents the weighted frequencies of visitors by frequency of skiing in the park as a function of activities. Frequency of skiing appears to be inversely related to the time spent in the park. Thus activities are associated to market segments in a similar manner as previously indicated. Hence, the specific mapping for table 5 is not presented.

4.6 Crosstabulations of day time cross-country skiers (weighted) by frequency of skiing as a function of type of skiers.

Table 6 presents the weighted frequencies of day time cross-country visitors by frequency of skiing as a function of type of skiers. Examination of the associated mapping on figure 6 indicates again that distance from the park is an underlying dimension. Frequent skiers (S4) tend to be coming from Centre Kent on week days and are planning more than 50 visits during the winter season. On the other hand, on the right side of figure 6, less frequent skiers (S1) tend to come from other New Brunswick and Westmorland on weekends, are planning 1 to 5 visits during the winter season and they ski in other areas such as the Moncton region and other areas in New Brunswick. 75% of weighted variance is accounted for by this underlying dimension.

4.7 Day time cross-country skiers (weighted) by frequency of skiing as a function of descriptive variable

Table 7 presents the weighted frequencies of day time cross-country skiers as a function of descriptive variables such as party composition, number in party, presence of children under 12 underlying dimension than in figure 6. Less frequent skiers (S1) tend to be larger parties with kids coming from other Kent and Westmorland (on the right side of figure 7).

4.8 Winter day time (week days, weekends) and evening visitors (unweighted) as a function of activities

Table 8 presents the unweighted frequencies of week days, weekends and evening visitors as a function of activities. The associated mapping on figure 8 allows us to visualize the relative size and characteristics of each market segment. The largest segment is the weekend visitors (WE=52.9%), staying in the park more than 3 hours, more likely to use the restaurant and the Reception Centre than week days or evening visitors. Evening visitors (EV) is a smaller segment (14.5%) staying in the park for 1h. to 1h.30 and more likely to use the waxing chalet than week days or weekends visitors. Frequency of visits and time spent in the park appears to be the underlying dimension accounting for 79% of weighted variance.

TABLE 5

DAY TIME CROSS-COUNTRY SKIERS (WEIGHTED) BY FREQUENCY OF SKIING AS A FUNCTION OF ACTIVITIES

FREQUENCY ACTIVITIES	1 TO 5 TIMES PER MONTH	6 TO 10 TIMES PER MONTH	11 TO 15 TIMES PER MONTH	MORE THAN 15 PER MONTH
Time spent in the park (N=3675)				
.less than 1h.	29	17	15	15
.1h. - 1h.30	319	140	81	327
.1h.30 - 2h.	484	215	67	282
.2h. - 3h.	416	218	118	226
.more than 3h.	388	95	56	165
Number of km skied (N=3675)				
.1 to 5	778	274	116	194
.6 to 10	652	277	137	420
.more than 10	207	134	85	420
Services (N=3675)				
.Waxing chalet used:				
-Patterson	364	85	30	55
-Petit large	754	374	188	329
-La Source	123	188	47	136
-Middle Kouchibouguac	408	329	78	274

TABLE 5 (continued)

DAY TIME CROSS-COUNTRY SKIERS (WEIGHTED) BY FREQUENCY OF SKIING AS A FUNCTION OF ACTIVITIES

(N= 3675)

FREQUENCY ACTIVITIES	1 TO 5 TIMES PER MONTH	6 TO 10 TIMES PER MONTH	11 TO 15 TIMES PER MONTH	MORE THAN 15 PER MONTH
Time				
.weekdays	409	292	183	600
.weekends	1228	293	154	414

TABLE 6

DAY TIME CROSS-COUNTRY SKIERS (WEIGHTED) BY FREQUENCY OF SKIING AS A FUNCTION OF TYPE OF SKIERS

FREQUENCY TIME OF SKIERS	1 TO 5 TIMES PER MONTH	6 TO 10 TIMES PER MONTH	11 TO 15 TIMES PER MONTH	MORE THAN 15 PER MONTH
Time (N=3675)				
.week days	409	292	183	600
.week ends	1228	393	154	414
Number of visits planned (N=3675)				
.1 to 5 for the winter	399	86	17	47
.6 to 10 for the winter	466	68	22	21
.11 to 20 for winter	329	244	24	73
.21 to 50 for the winter	75	205	222	252
.more than 50 for the winter	36	38	38	567
Skiing in other areas (N=3675)				
.Kent region	325	116	40	74
.Moncton region	249	63	15	29
.Other New-Brunswick	254	52	36	63

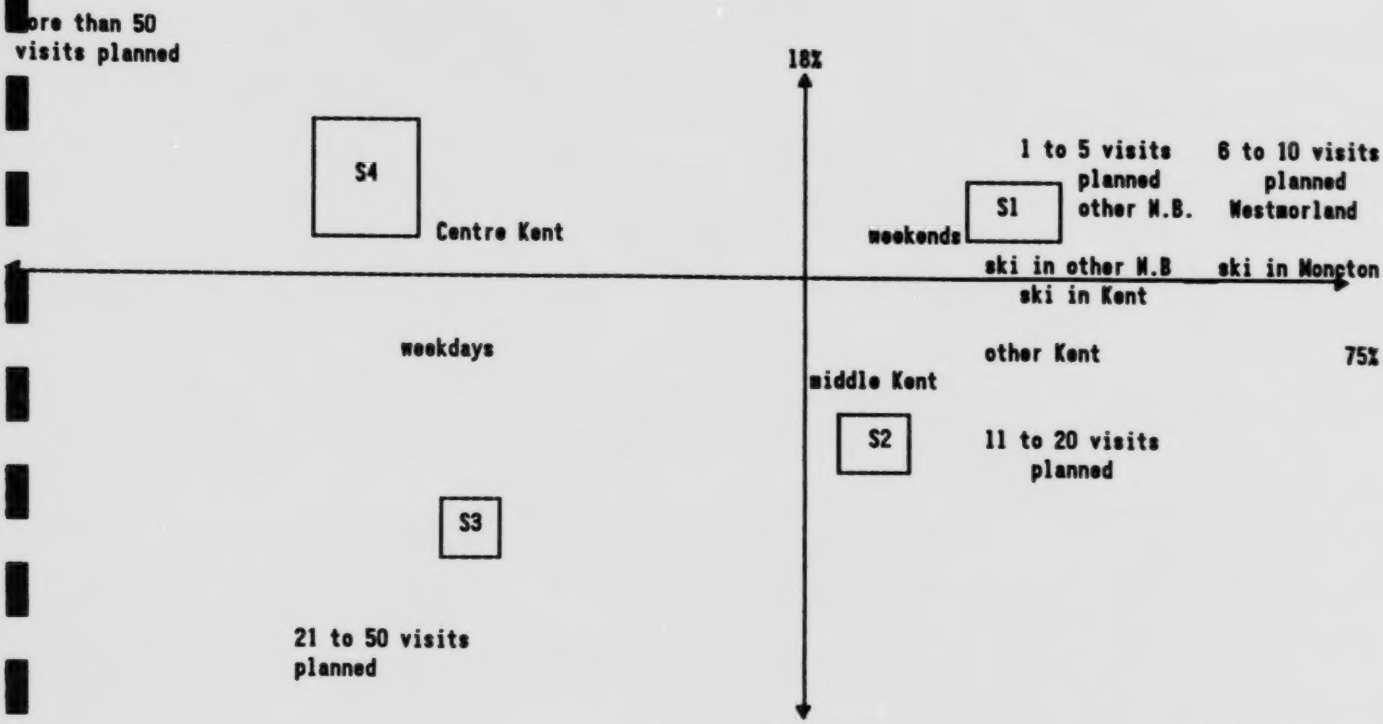
TABLE 6 (continued)

DAY TIME CROSS-COUNTRY SKIERS (WEIGHTED) BY FREQUENCY OF SKIING AS A FUNCTION OF TYPE OF SKIERS

(N= 3675)

Origin				
.Kent 1	669	250	158	720
.Kent 2	343	229	66	161
.Other Kent	321	90	63	81
.Westmorland	332	79	15	22
.Other New Brunswick	240	24	36	31

FIGURE 6: MAPPING OF DAYTIME CROSS COUNTRY SKIERS ACCORDING TO FREQUENCY OF SKIING IN RELATION TO ORIGIN, TIME OF WEEK AND OTHER SKI AREAS


ore than 50
visits planned
18%
S4
Centre Kent
1 to 5 visits
planned
other N.B.
6 to 10 visits
planned
Westmorland
S1
weekends
ski in other N.B
ski in Kent
ski in Moncton
weekdays
other Kent
75%
middle Kent
S2
11 to 20 visits
planned
S3
21 to 50 visits
planned

LEGEND	
	% of daytime cross country skiers
S1: 1 to 5 times per month	44.5%
S2: 6 to 10 times per month	18.6%
S3: 11 to 15 times per month	9.2%
S4: more than 15 times per month	27.6%

TABLE 7

DAY TIME CROSS-COUNTRY SKIERS (WEIGHTED) BY FREQUENCY OF SKIING AS A FUNCTION OF DESCRIPTIVE VARIABLES

FREQUENCY DESCRIPTIVE VARIABLES	1 TO 5 TIMES PER MONTH	6 TO 10 TIMES PER MONTH	11 TO 15 TIMES PER MONTH	MORE THAN 15 PER MONTH
Origin (N=3675)				
.Kent 1	669	250	158	720
.Kent 2	343	229	66	161
.Other Kent	321	90	63	81
.Westmorland	332	79	15	22
.Other New-Brunswick	240	24	36	31
Lunch (N=3675)				
.Restaurant	66	14	0	8
.Own lunch brought	828	315	138	168
.No lunch	543	148	46	141
Party composition (N=3675)				
.Family with kids	407	123	21	68
.Group of friends	447	141	79	88
.Alone	317	243	122	576
.Couple	444	169	116	275
Number in party				
.2 persons	797	249	147	345
.3 persons	223	91	47	70
.4 persons	300	102	22	24

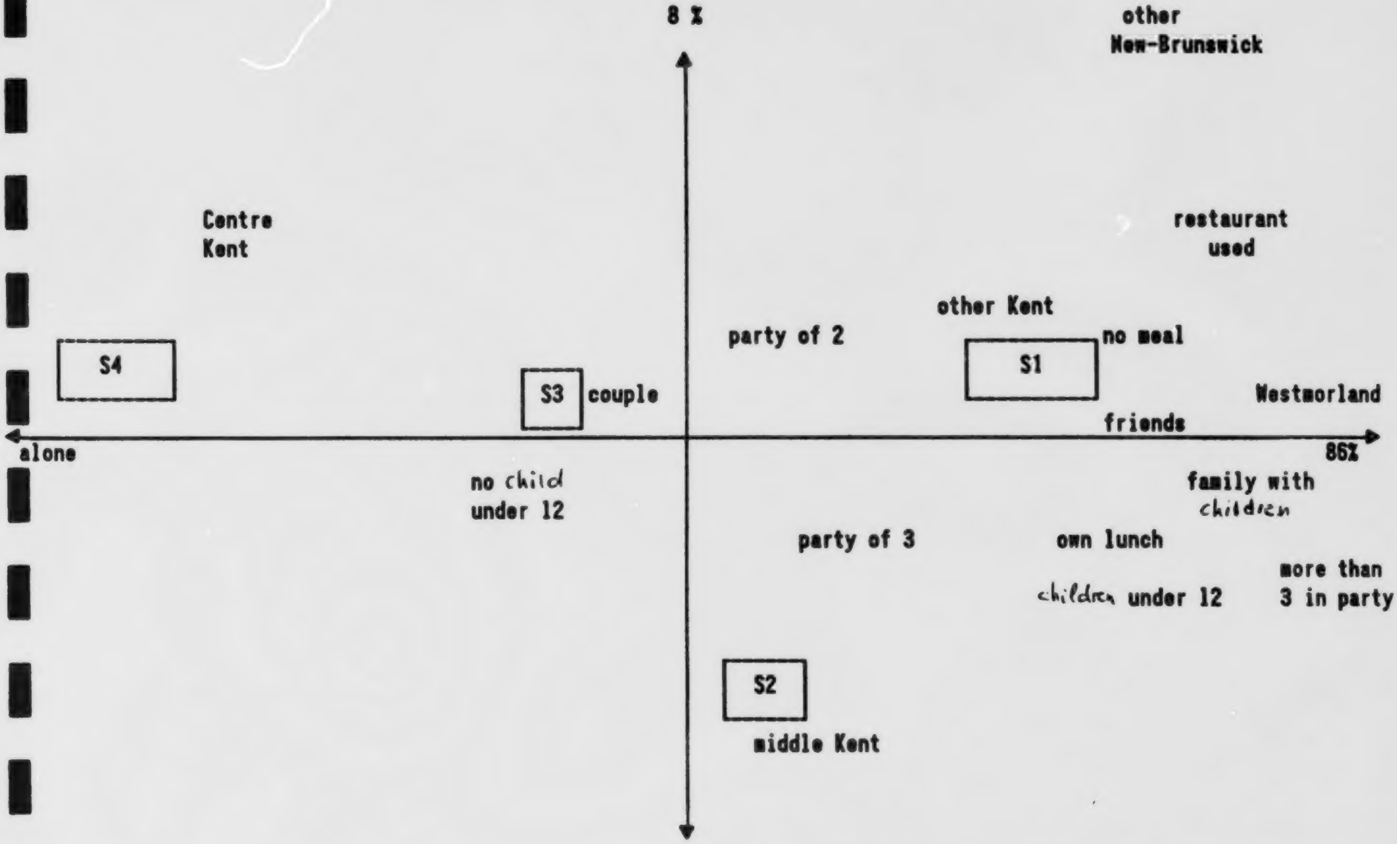
TABLE 7 (continued)

DAY TIME CROSS-COUNTRY SKIERS (WEIGHTED) BY FREQUENCY OF SKIING AS A FUNCTION OF DESCRIPTIVE VARIABLES

(N= 3675)

FREQUENCY DESCRIPTIVE VARIABLES	1 TO 5 TIMES PER MONTH	6 TO 10 TIMES PER MONTH	11 TO 15 TIMES PER MONTH	MORE THAN 15 PER MONTH
Children under 12 years				
.None	1281	553	323	940
.One or more	356	131	15	74

FIGURE 7: MAPPING OF DAY TIME CROSS COUNTRY SKIERS ACCORDING TO FREQUENCY OF SKIING IN RELATION TO ORIGIN, ACTIVITIES AND GROUP COMPOSITION



LEGEND	
	% of daytime cross country skiers
S1: 1 to 5 times per month	44.5%
S2: 6 to 10 times per month	18.6%
S3: 11 to 15 times per month	9.2%
S4: more than 15 times per month	27.6%

TABLE 8

WINTER DAYTIME (WEEK DAYS, WEEKENDS) AND EVENING VISITORS (UNWEIGHTED) AS A FUNCTION OF ACTIVITIES

VISITORS	DAYTIME VISITORS ACTIVITIES		EVENING
ACTIVITIES	WEEKDAYS	WEEKENDS	VISITORS
Activities (N=760)			
. Skiing (1-5 times/month	49	175	29
. Skiing (+5 times/month)	129	137	79
. Sightseeing	35	102	0
Services (N=760)			
.Reception Centre	14	41	4
.Waxing chalet	65	148	69
.Restaurant	3	14	3
.Own lunch brought	61	152	29
.No lunch	66	165	35
Time spent in the park (N=760)			
.less than 1 h	28	69	7
.1 h - 1 h30	62	111	54
.1 h30 - 2 h	58	94	23
.2 h - 3 h	50	81	11
.more than 3 h	24	73	15

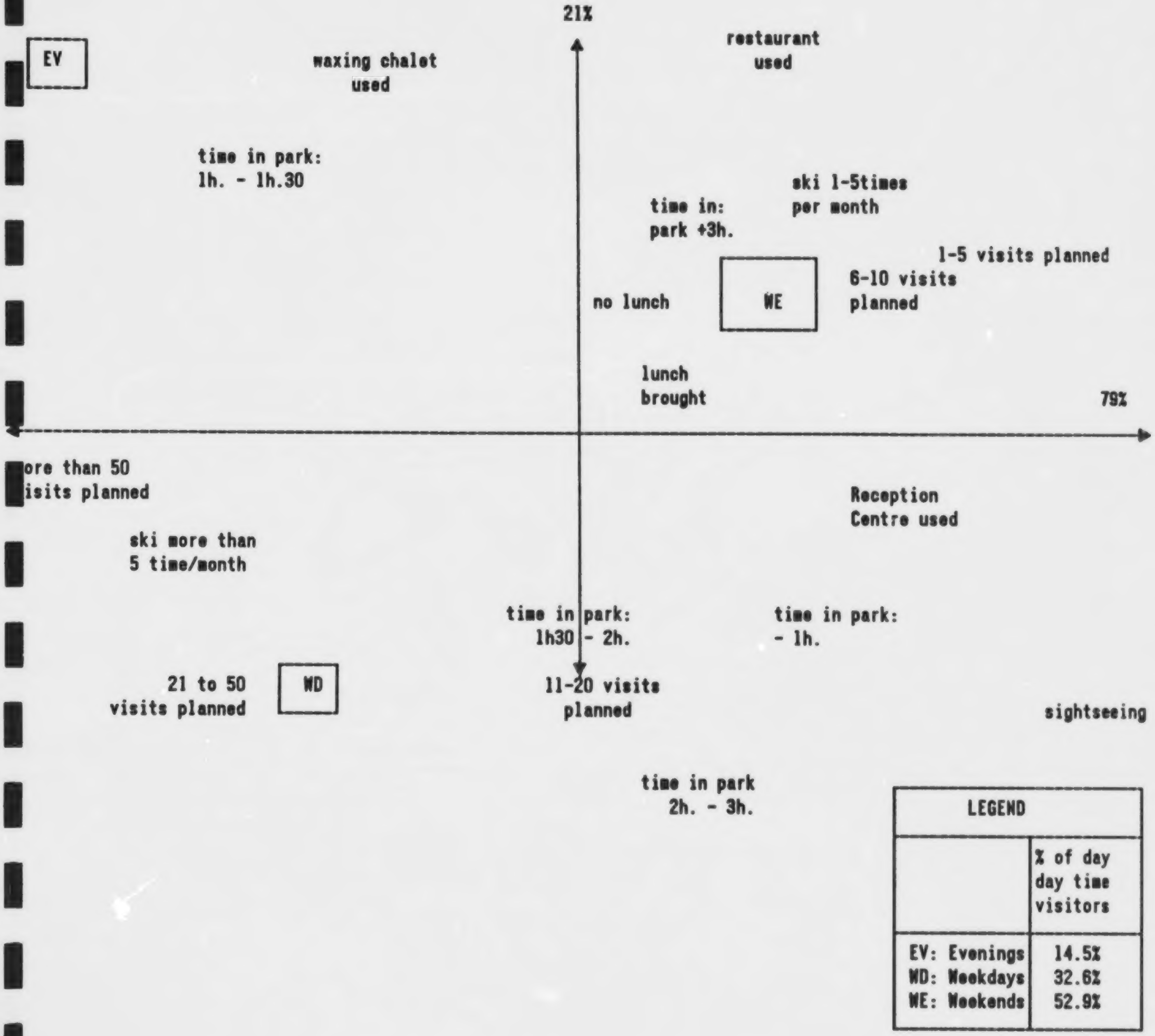
TABLE 8 (continued)

WINTER DAYTIME (WEEK DAYS, WEEKENDS) AND EVENING VISITORS (UNWEIGHTED) AS A FUNCTION OF ACTIVITIES

(N=760)

VISITORS ACTIVITIES	DAYTIME VISITORS ACTIVITIES		EVENING VISITORS
	WEEK DAYS	WEEKENDS	
Number of visits planned			
.1 to 5 for the winter	24	90	11
.6 to 10	25	87	12
.11 to 20	45	71	15
.21 to 50	57	63	24
.More than 50	55	53	36

FIGURE 8: MAPPING OF PARTY VISITORS ACORDING TO THE TIME OF THE VISIT IN RELATION TO ACTIVITIES SERVICES, TIME SPENT IN THE PARK AND NUMBER OF VISITS PLANNED



4.9 Winter day time (week days, weekends) and evening visitors (unweighted) as a function of descriptive variables.

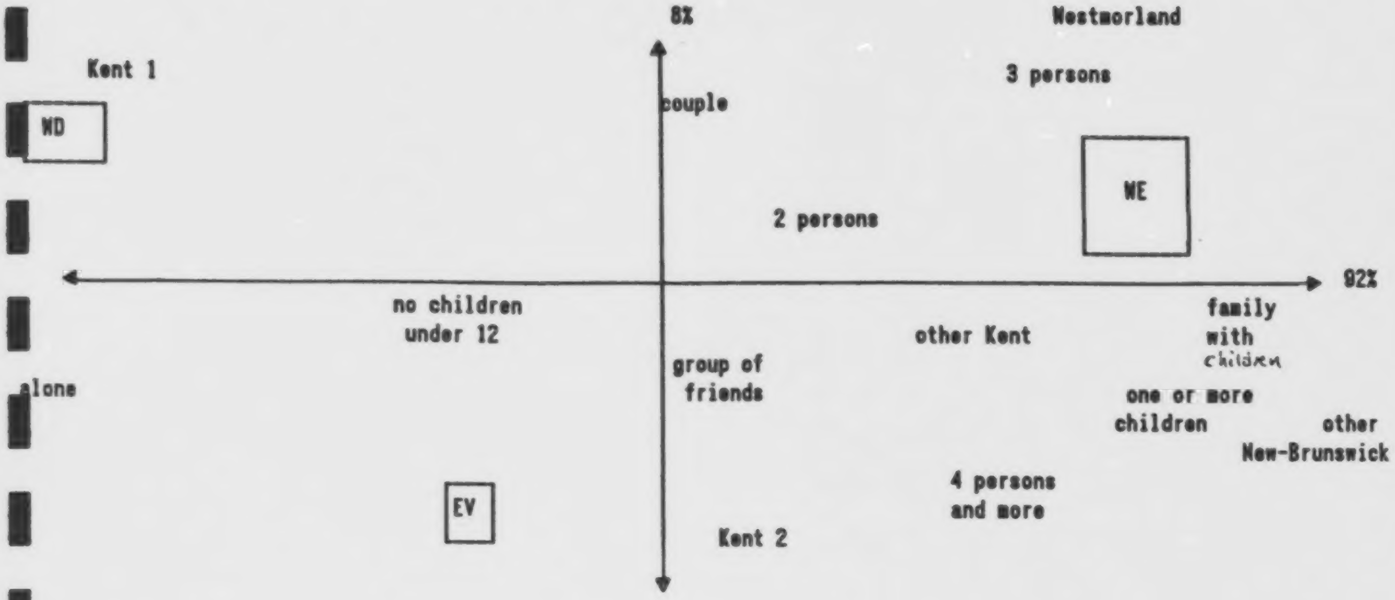
Table 9 presents the unweighted frequencies of week days weekends and evening visitors as a function of descriptive variables such as a party composition, number in party and presence of children under 12 years old. Figure 9 gives the geographical origin and group composition of weekend, week day and evening visitors. As can be seen on figure 9, weekend visitors tend to be families with kids coming from other Kent or Westmorland. Evening visitors tend to be alone with no children under 12. Size of party appears to be an underlying dimension accounting for 92% of weighted variance.

TABLE 9

WINTER DAYTIME (WEEK DAYS, WEEKENDS) AND EVENING VISITORS (UNWEIGHTED) AS A FUNCTION OF DESCRIPTIVE VARIABLES

VISITORS DESCRIPTIVE VARIABLES	DAYTIME VISITORS ACTIVITIES		EVENING VISITORS
	WEEK DAYS	WEEKENDS	
Origin (N=760)			
.Kent 1	134	45	46
.Kent 2	41	96	33
.Other Kent	24	69	15
.Westmorland	12	61	5
.Other New Brunswick	7	52	9
Party composition (N=760)			
.Family with kids	17	97	17
.Group of friends	43	92	24
.Alone	99	109	42
.Couple	61	125	24
Number in party (N=760)			
.2 persons	85	203	42
.3 persons	20	56	10
.4 persons and more	18	60	16
Children under 12 years (N=760)			
.None	205	341	94
.One or more	17	87	16

FIGURE 9: MAPPING OF PARTY VISITORS ACCORDING TO THE TIME OF THE VISIT IN RELATION TO ORIGIN AND PARTY COMPOSITION


8%
Westmorland
Kent 1
3 persons
WD
couple
WE
2 persons
92%
no children
under 12
family
with
children
other Kent
group of
friends
alone
one or more
children
other
New-Brunswick
4 persons
and more
EV
Kent 2

LEGEND	
	% of day time visitors
EV: Evening	14.6%
WD: Weekdays	32.6%
WE: Weekends	52.9%

SPSS CODINGS FOR VARIABLE GROUPING AND CROSS-TABULATIONS CHAPTER	5

```
17-Feb-89   SPSS-X RELEASE 3.0 FOR IBM OS/MVS
12:35:46    UNIVERSITE LAVAL                       IBM 3031          MVS/SP

1574  0  END DATA

PRECEDING TASK REQUIRED        0.72 SECONDS CPU TIME;       1.33 SECONDS ELAPSED.

1575   0   WEIGHT BY WT
1576   0   SELECT IF (TIME LE 8)
1577   0   RECODE ORIGIN (1,2,5=2) (6,3=1) (4,7,9=3) (10,11,12,15=5)
1578   0                 (13,14=4) (20,24,28,30=6)
1579   0   RECODE MAINRES (3,7=3)
1580   0   RECODE DATE (103,111,113,118,119,120,121,205=1)
1581   0               (108,115,116,123,201,208,209=2)
1582   0   RECODE VSLENGTH (1 THRU 7=1) (10,12,15=2) (17,20=3) (22 THRU 30=4)
1583   0                   (32 THRU 80=5)
1584   0   RECODE PARTYNO (4 THRU 17=4)
1585   0   RECODE SKIFREQ (2,3,4=2)
1586   0   RECODE NUMVISIT (1 THRU 5=1) (6 THRU 10=2) (11 THRU 20=3)
1587   0                   (21 THRU 50=4) (51 THRU 99=5)
1588   0   RECODE UNDER12 (3 THRU 6=3)
1589   0   RECODE NUMKILOS (1 THRU 5=1) (6 THRU 10=2) (11 THRU 32=3)
1590   0   VALUE LABELS
1591   0     SKIFREQ 1 '1 TO 5' 2 '>5'/
1592   0     NUMVISIT 1 '1 TO 5' 2 '6 TO 10' 3 '11 TO 20' 4 '21 TO 50'
1593   0              5 '>50'/
1594   0     UNDER12 3 '>2'/
1595   0     NUMKILOS 1 '1 TO 5 KM' 2 '6 TO 10 KM' 3 '>10 KM'/
1596   0     ORIGIN 1 'KENT1' 4 'WESTMORLAND' 5 'OTH N-B' 6 'OTHER'
1597   0            2 'KENT2' 3 'OTH KENT'/
1598   0     MAINRES 1 'SKIING' 3 'VISIT'/
1599   0     VSLENGTH 1 '< 1H' 2 ' 1H - 1H30"' 3 '"1H30 - 2H"' 4 '"2H - 3H"'
1600   0              5 '> 3H'/
1601   0     DATE 1 'WEEKDAY' 2'WEEKEND'/
1602   0     PARTYNO 4 '4 AND +'
1603   0   CROSSTABS TABLES= ORIGIN BY MAINRES,SKIFREQ,VSLENGTH,DATE,ENTERVRC,
1604   0                     ENTERWAX,LUNCH,PARTYCOM,PARTYNO,UNDER12,NUMVISIT
1605   0   OPTIONS  3 4

There are 379416 bytes of memory available.
The largest contiguous area has 379416 bytes.

 ***** GIVEN WORKSPACE ALLOWS FOR 12647 CELLS WITH     2 DIMENSIONS FOR CROSSTA
```

```
17-Feb-89    SPSS-X RELEASE 3.0 FOR IBM OS/MVS
13:24:46     UNIVERSITE LAVAL                  IBM 3081          MVS/SP

1574  0  END DATA

PRECEDING TASK REQUIRED        0.72 SECONDS CPU TIME;       1.23 SECONDS ELAPSED.

1575  0  SELECT IF (TIME GT 8)
1576  0  RECODE ORIGIN (1,2,5=2) (6,3=1) (4,7,9=3) (10,11,12,15=5)
1577  0                (13,14=4) (20,24,28,30=6)
1578  0  RECODE MAINRES (3,7=3)
1579  0  RECODE DATE (103,111,113,118,119,120,121,205=1)
1580  0              (108,115,116,123,201,208,209=2)
1581  0  RECODE VSLENGTH (1 THRU 7=1) (10,12,15=2) (17,20=3) (22 THRU 30=4)
1582  0                  (32 THRU 60=5)
1583  0  RECODE SKIFREQ (2,3,4=2)
1584  0  RECODE TIME (9 THRU 13=9)
1585  0  RECODE PARTYNO (4 THRU 17=4)
1586  0  RECODE NUMVISIT (1 THRU 5=1) (6 THRU 10=2) (11 THRU 20=3)
1587  0                  (21 THRU 50=4) (51 THRU 98=5)
1588  0  RECODE UNDER12 (3 THRU 6=3)
1589  0  RECODE NUMKILOS (1 THRU 5=1) (6 THRU 10=2) (11 THRU 32=3)
1590  0  RECODE SHELNAME (1 THRU 40=1) (98=2)
1591  0  VALUE LABELS
1592  0     SKIFREQ 1 '1 TO 5' 2 '>5'/
1593  0     NUMVISIT 1 '1 TO 5' 2 '6 TO 10' 3 '11 TO 20' 4 '21 TO 50'
1594  0              5 '>50'/
1595  0     UNDER12 3 '>2'/
1596  0     NUMKILOS 1 '1 TO 5 KM' 2 '6 TO 10 KM' 3 '>10 KM'/
1597  0     ORIGIN 1 'KENT1' 4 'WESTMORLAND' 5 'OTH N-B' 6 'OTHER'
1598  0            2 'KENT2' 3 'OTH KENT'/
1599  0     MAINRES 1 'SKIING' 3 'VISIT'/
1600  0     VSLENGTH 1 '< 1H' 2 ' 1H - 1H30"' 3 '"1H30 - 2H"' 4 '"2H - 3H"'
1601  0              5 '> 3H'/
1602  0     DATE 1 'WEEKDAY' 2'WEEKEND'/
1603  0     TIME 9 'EVENING'/
1604  0     PARTYNO 4 '4 AND +'/
1605  0     SHELNAME 1 'YES' 2 'NO'/
1606  0  CROSSTABS TABLES= TIME BY SKIFREQ,MAINRES,VSLENGTH,ORIGIN,ENTERVRC,
1607  0                       ENTERWAX,LUNCH,PARTYCOM,PARTYNO,UNDER12,NUMVISIT
1608  0  OPTIONS  3 4

There are 379072 bytes of memory available.
The largest contiguous area has 379072 bytes.

 ***** GIVEN WORKSPACE ALLOWS FOR 12635 CELLS WITH     2 DIMENSIONS FOR CROSSTA
```

```
17-Feb-89    SPSS-X RELEASE 3.0 FOR IBM OS/MVS
13:08:08     UNIVERSITE LAVAL                  IBM 3081          MVS/SP

PRECEDING TASK REQUIRED        0.61 SECONDS CPU TIME;       1.36 SECONDS ELAPSED.

1608  0  CROSSTABS TABLES= VSLENGTH BY MAINRES,SKIFREQ,ORIGIN,DATE,ENTERVRC,
1609  0                    ENTERWAX,LUNCH,PARTYCOM,PARTYNO,UNDER12
1610  0  OPTIONS  3 4

There are 381960 bytes of memory available.
The largest contiguous area has 381960 bytes.

 ***** GIVEN WORKSPACE ALLOWS FOR 12732 CELLS WITH     2 DIMENSIONS FOR CROSSTA
```

```
17-Feb-89    SPSS-X RELEASE 3.0 FOR IBM OS/MVS
13:14:09     UNIVERSITE LAVAL                        IBM 3081          MVS/SP

1574   0   END DATA

PRECEDING TASK REQUIRED        0.72 SECONDS CPU TIME;        1.42 SECONDS ELAPSED

1575   0   SELECT IF (TIME LE 8)
1576   0   RECODE ORIGIN (1,2,5=2) (6,3=1) (4,7,9=3) (10,11,12,15=5)
1577   0                 (13,14=4) (20,24,28,30=6)
1578   0   RECODE MAINRES (3,7=3)
1579   0   RECODE DATE (103,111,113,118,119,120,121,205=1)
1580   0               (108,115,116,123,201,208,209=2)
1581   0   RECODE VSLENGTH (1 THRU 7=1) (10,12,15=2) (17,20=3) (22 THRU 30=4)
1582   0                   (32 THRU 80=5)
1583   0   RECODE SKIFREQ (2,3,4=2)
1584   0   RECODE PARTYNO (4 THRU 17=4)
1585   0   RECODE NUMVISIT (1 THRU 5=1) (6 THRU 10=2) (11 THRU 20=3)
1586   0                   (21 THRU 50=4) (51 THRU 98=5)
1587   0   RECODE UNDER12 (3 THRU 6=3)
1588   0   RECODE NUMKILOS (1 THRU 5=1) (6 THRU 10=2) (11 THRU 32=3)
1589   0   RECODE SHELNAME (1 THRU 40=1) (98=2)
1590   0   VALUE LABELS
1591   0     SKIFREQ 1 '1 TO 5' 2 '>5'/
1592   0     NUMVISIT 1 '1 TO 5' 2 '6 TO 10' 3 '11 TO 20' 4 '21 TO 50'
1593   0              5 '>50'/
1594   0     UNDER12 3 '>2'/
1595   0     NUMKILOS 1 '1 TO 5 KM' 2 '6 TO 10 KM' 3 '>10 KM'/
1596   0     ORIGIN 1 'KENT1' 4 'WESTMORLAND' 5 'OTH N-B' 6 'OTHER'
1597   0            2 'KENT2' 3 'OTH KENT'/
1598   0     MAINRES 1 'SKIING' 3 'VISIT'/
1599   0     VSLENGTH 1 '< 1H' 2 ' 1H - 1H30"' 3 '"1H30 - 2H"' 4 ']2H - 3H]'
1600   0              5 '> 3H'/
1601   0     DATE 1 'WEEKDAY' 2'WEEKEND'/
1602   0     PARTYNO 4 '4 AND +'/
1603   0     SHELNAME 1 'YES' 2 'NO'/
1604   0   CROSSTABS TABLES= DATE BY SKIFREQ,MAINRES,VSLENGTH,ORIGIN,ENTERVRC,
1605   0                     ENTERWAX,LUNCH,PARTYCOM,PARTYNO,UNDER12,NUMVISIT
1606   0   OPTIONS  3 4

There are 379224 bytes of memory available.
The largest contiguous area has 379224 bytes.

 ***** GIVEN WORKSPACE ALLOWS FOR 12640 CELLS WITH      2 DIMENSIONS FOR CROSSTAB
```

LEGEND FOR MAPPING INTERPRETATION | CHAPTER | 6

LEGEND FOR THE INTERPRETATION OF PERCEPTUAL MAPS

N.B.= New Brunswick

FREQUENCY OF SKIIING

S1: 1 to 5 times per month
S2: 6 to 10 times per month
S3: 11 to 15 times per month
S4: more than 15 times per month

ORIGIN

K1: Kent 1
K2: Kent 2
OK: Other Kent
WS: Westmorland
ON: Other New Brunswick

d1: time spent in the park 1h.
d2: time spent in the park (1h. - 1h30)
d3: time spent in the park)1h30 - 2h.)
d4: time spent in the park)2h. - 3h.)
d5: time spent in the park 3h.

1k: 1 to 5 km by ski
2k: 6 to 10 km by ski
3k: more than 10 km by ski

fr: waxing chalet used
ab: shelters used
ac: Reception Centre used
rt: restaurant used
ra: own meal brought
pr: no meal

sk: ski in Kent region too
sm: ski in Moncton region too
so: sk in other N.B. too

ev: evenings
wd: weekdays
we: weekends

p1 1 to 5 visits planned/winter
p2 6 to visits planned/winter
p3: 11 to 20 visits planned/winter
p4: 21 to 50 visits planned/winter
p5: more than 50 visits planned/winter

fm: family with kids
am: friends
se: alone
co: couple

g2: 2 people in the party
g3: 3 people in the party
g4: more than 3 people in the party

eo: no kid under 12
e1: kid(s) under 12

sp: ski not frequently (1-5 times/month)
sf: ski frequently (more than 5 times/month)
ri: sightseeing

pa: Patterson Shelter
pl: Petit Large Shelter
ls: La Source Shelter
mk: Middle Kouchibouguac Shelter

COMPLETE PRINTED OUTPUT OF CORRESPONDENCE ANALYSIS
FOR ORIGIN BY DESCRIPTIVE VARIABLES FOR WINTER
PARTY VISITORS (TABLE 1 FIGURE 1 DATA
PROCESSING)

CHAPTER 7

ORIGIN VERSUS ACTIVITY VARIABLES - WINTER

DATA MATRIX

	1 K1	2 K2	3 OK	4 WS	5 ON	sum
1 sp	369	343	321	332	240	1605
2 sf	1127	456	233	116	91	2023
3 vi	561	174	115	80	56	986
4 ac	109	28	28	116	94	375
5 fr	560	367	263	223	146	1559
6 rt	17	7	28	42	22	116
7 ra	341	362	253	357	238	1551
8 pr	732	384	300	122	142	1680
9 wd	1118	342	200	100	58	1818
10 we	1018	674	484	428	365	2969
11 d1	383	154	73	42	50	702
12 d2	725	290	161	36	77	1289
13 d3	486	283	178	111	80	1138
14 d4	388	208	186	87	108	977
15 d5	154	81	87	252	108	682
16 p1	126	139	162	217	150	794
17 p2	295	226	148	50	100	819
18 p3	380	273	171	28	22	874
19 p4	579	242	74	0	22	917
20 p5	693	116	21	0	0	830
sum	10161	5149	3486	2739	2169	23704

```
ROW PROFILES
------------

              1     2     3     4     5    sum

                   K1    K2    OK    WS    ON

        1 sp     23.0  21.4  20.0  20.7  15.0   100.0
        2 sf     55.7  22.5  11.5   5.7   4.5   100.0
        3 vi     56.9  17.6  11.7   8.1   5.7   100.0
        4 ac     29.1   7.5   7.5  30.9  25.1   100.0
        5 fr     35.9  23.5  16.9  14.3   9.4   100.0
        6 rt     14.7   6.0  24.1  36.2  19.0   100.0
        7 rm     22.0  23.3  16.3  23.0  15.3   100.0
        8 pr     43.6  22.9  17.9   7.3   8.5   100.0
        9 wd     61.5  18.8  11.0   5.5   3.2   100.0
       10 we     34.3  22.7  16.3  14.4  12.3   100.0
       11 d1     54.6  21.9  10.4   6.0   7.1   100.0
       12 d2     56.2  22.5  12.5   2.6   6.0   100.0
       13 d3     42.7  24.9  15.6   9.8   7.0   100.0
       14 d4     39.7  21.3  19.0   8.9  11.1   100.0
       15 d5     22.6  11.9  12.8  37.0  15.8   100.0
       16 p1     15.9  17.5  20.4  27.3  18.9   100.0
       17 p2     36.0  27.6  18.1   6.1  12.2   100.0
       18 p3     43.5  31.2  19.6   3.2   2.5   100.0
       19 p4     63.1  26.4   8.1   0.0   2.4   100.0
       20 p5     83.5  14.0   2.5   0.0   0.0   100.0
       21 fm     26.6  22.6  18.2  17.9  14.7   100.0
       22 am     30.4  26.4  18.5  12.7  12.0   100.0
       23 se     66.4  15.7  10.6   3.1   4.2   100.0
       24 co     40.3  22.8  13.7  15.3   7.9   100.0
       25 g1     66.4  15.7  10.6   3.1   4.2   100.0
       26 g2     37.8  25.1  15.6  12.9   8.4   100.0
       27 g3     34.9  26.0  15.5   8.0  15.5   100.0
       28 g4     16.6  17.4  18.1  30.1  17.6   100.0
       29 e0     48.5  20.9  13.8   9.6   7.3   100.0
       30 e1     24.0  22.9  17.1  18.7  17.3   100.0

     average     42.9  21.7  14.7  11.6   9.2   100.0
```

```
ROW CONTRIBUTIONS
-----------------

---+-----+------------+-------------+-------------+-------------+
  I¦ NAME¦ QLT MAS INR¦  k=1 COR CTR¦  k=2 COR CTR¦  k=3 COR CTR¦
---+-----+------------+-------------+-------------+-------------+
  1¦ sp  ¦ 997  68  85¦ -464 979  98¦  -62  18  12¦   -3   0   0¦
  2¦ sf  ¦ 996  85  48¦  311 980  56¦   30   9   4¦  -27   8  17¦
  3¦ vi  ¦ 974  42  20¦  254 773  18¦  129 200  32¦   -6   0   0¦
  4¦ ac  ¦ 995  16  70¦ -703 637  53¦  472 288 162¦  235  71 234¦
  5¦ fr  ¦ 999  66   8¦ -127 719   7¦  -58 148  10¦  -55 132  52¦
  6¦ rt  ¦ 931   5  27¦ -929 872  28¦  233  55  12¦  -67   4   6¦
  7¦ ra  ¦ 976  65  97¦ -503 974 112¦   -8   0   0¦  -25   2  11¦
  8¦ pr  ¦ 868  71  10¦   84 295   3¦ -114 539  42¦   28  34  15¦
  9¦ wd  ¦ 990  77  72¦  366 902  77¦  114  80  46¦  -37   8  27¦
 10¦ we  ¦ 992 125  26¦ -184 914  29¦  -45  55  12¦   29  22  28¦
 11¦ d1  ¦ 975  30  13¦  263 910  14¦   52  35   4¦   47  29  17¦
 12¦ d2  ¦1000  54  38¦  346 974  44¦  -19   3   1¦   54  23  42¦
 13¦ d3  ¦ 981  48   4¦   62 298   1¦  -79 489  14¦  -50 193  32¦
 14¦ d4  ¦ 743  41   6¦  -27  29   0¦ -110 480  23¦   77 234  65¦
 15¦ d5  ¦1000  29 122¦ -765 780 113¦  378 191 186¦ -145  29 169¦
 16¦ p1  ¦ 995  33  99¦ -718 993 116¦   30   2   1¦   23   1   4¦
 17¦ p2  ¦ 984  35  14¦  -13   2   0¦ -234 777  87¦  120 205 133¦
 18¦ p3  ¦1000  37  35¦  246 364  15¦ -302 549 154¦ -120  87 143¦
 19¦ p4  ¦ 963  39  66¦  539 963  76¦   -3   0   0¦   -3   0   0¦
 20¦ p5  ¦1000  35 143¦  773 826 141¦  351 171 197¦   22   1   4¦
---+-----+------------+-------------+-------------+-------------+

---+-----+------------+-------------+-------------+-------------+
 IS¦ NAME¦ QLT MAS INR¦  k=1 COR CTR¦  k=2 COR CTR¦  k=3 COR CTR¦
---+-----+------------+-------------+-------------+-------------+
 21¦ fm  ¦ 999  35  27¦ -364 957  31¦  -69  35   8¦   33   8  10¦
 22¦ am  ¦ 987  40  15¦ -190 547  10¦ -169 435  53¦   15   5   3¦
 23¦ se  ¦ 968  67  93¦  459 861  95¦  156  99  75¦   43   8  34¦
 24¦ co  ¦ 897  58   6¦  -71 296   2¦   35  73   3¦  -95 527 137¦
 25¦ g1  ¦ 968  67  93¦  459 861  95¦  156  99  75¦   43   8  34¦
 26¦ g2  ¦ 906  89   7¦  -64 287   2¦  -69 338  19¦  -63 281  94¦
 27¦ g3  ¦ 923  24  11¦  -96 116   1¦ -156 310  26¦  195 497 247¦
 28¦ g4  ¦1000  23  70¦ -732 975  81¦  106  21  12¦  -45   4  14¦
 29¦ e0  ¦ 984 170  15¦  119 917  16¦   29  56   7¦  -13  11   7¦
 30¦ e1  ¦ 986  32  37¦ -435 925  40¦  -60  17   5¦   94  44  75¦
---+-----+------------+-------------+-------------+-------------+


COLUMN CONTRIBUTIONS
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---+-----+------------+-------------+-------------+-------------+
  J¦ NAME¦ QLT MAS INR¦  k=1 COR CTR¦  k=2 COR CTR¦  k=3 COR CTR¦
---+-----+------------+-------------+-------------+-------------+
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  2¦ K2  ¦ 881 217  46¦   44  50   3¦ -175 812 305¦  -27  19  41¦
  3¦ OK  ¦ 902 147  69¦ -184 406  33¦ -202 492 275¦  -16   4  12¦
  4¦ WS  ¦1000 116 383¦ -730 912 414¦  209  75 232¦  -67  13 234¦
  5¦ ON  ¦ 999  92 172¦ -549 911 186¦   19   1   2¦  170  87 709¦
---+-----+------------+-------------+-------------+-------------+
CHI-SQUARE CONTRIBUTIONS
------------------------

              1     2     3     4     5

             K1    K2    OK    WS    ON

  1 sp       35     0     7    28    14
  2 sf       19     0     3    14    11
  3 vi       11     2     1     2     3
  4 ac        4     8     3    29    25
  5 fr        4     1     1     2     0
  6 rt        5     3     2    15     3
  7 ra       38     0     1    42    16
  8 pr        0     0     3     6     0
  9 wd       35     2     4    14    17
 10 we       12     0     1     5     8
 11 d1        5     0     2     5     1
 12 d2       13     0     1    20     3
 13 d3        0     1     0     1     1
 14 d4        1     0     3     1     1
 15 d5       16     7     0    91     8
 16 p1       32     2     4    41    20
 17 p2        2     3     2     5     2
 18 p3        0     9     3    13    10
 19 p4       21     2     7    25    11
 20 p5       76     5    20    23    18

Chi-square statistic = 4182.19 (d.f.=  76)
```
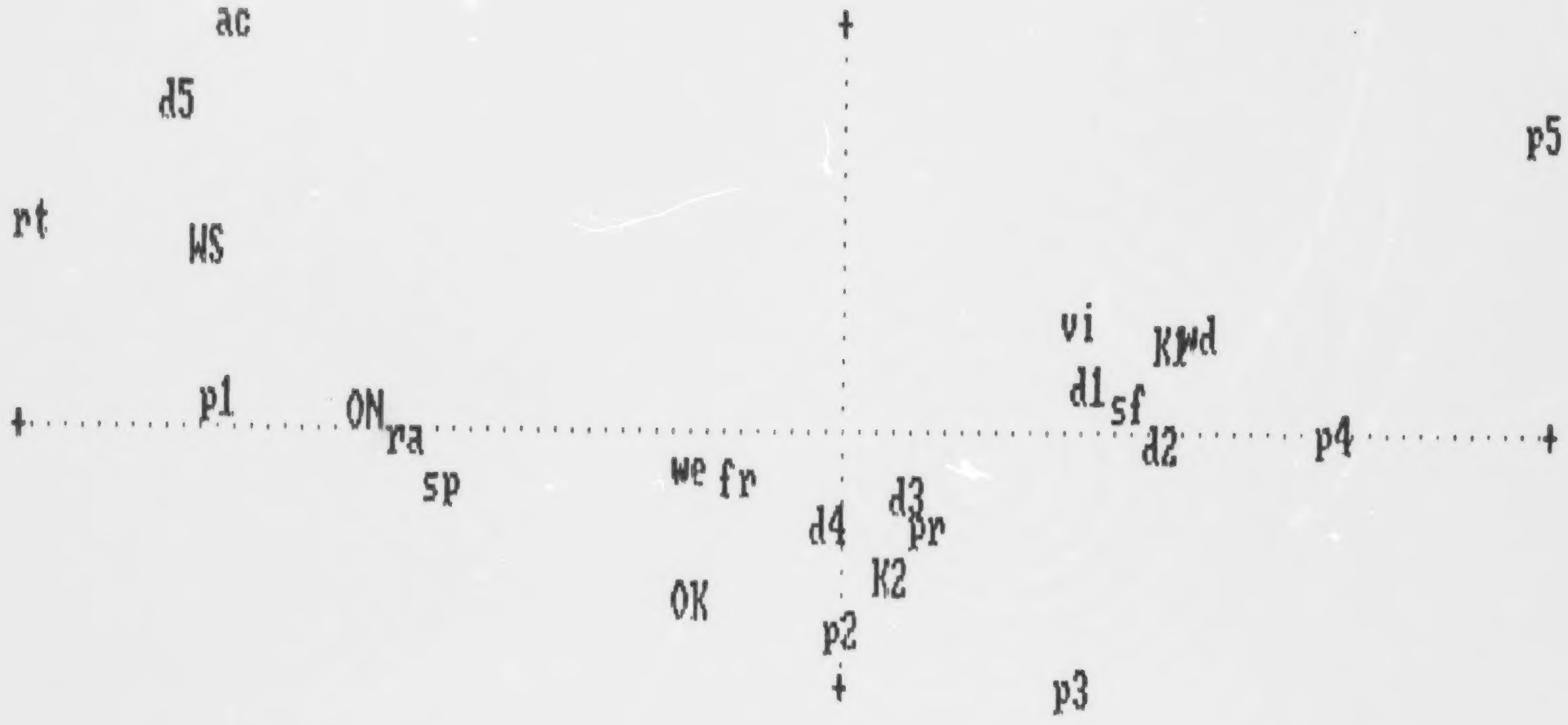

```
COLUMN PROFILES
---------------

              1     2     3     4     5   average

             K1    K2    OK    WS    ON

  1 sp      3.6   6.7   9.2  12.1  11.1     6.8
  2 sf     11.1   8.9   6.7   4.2   4.2     8.5
  3 vi      5.5   3.4   3.3   2.9   2.6     4.2
  4 ac      1.1   0.5   0.8   4.2   4.3     1.6
  5 fr      5.5   7.1   7.5   8.1   6.7     6.6
  6 rt      0.2   0.1   0.8   1.5   1.0     0.5
  7 ra      3.4   7.0   7.3  13.0  11.0     6.5
  8 pr      7.2   7.5   8.6   4.5   6.5     7.1
  9 wd     11.0   6.6   5.7   3.7   2.7     7.7
 10 we     10.0  13.1  13.9  15.6  16.8    12.5
 11 d1      3.6   3.0   2.1   1.5   2.3     3.0
 12 d2      7.1   5.6   4.6   1.3   3.6     5.4
 13 d3      4.8   5.5   5.1   4.1   3.7     4.8
 14 d4      3.8   4.0   5.3   3.2   5.0     4.1
 15 d5      1.5   1.6   2.5   9.2   5.0     2.9
 16 p1      1.2   2.7   4.6   7.9   6.9     3.3
 17 p2      2.9   4.4   4.2   1.8   4.6     3.5
 18 p3      3.7   5.3   4.9   1.0   1.0     3.7
 19 p4      5.7   4.7   2.1   0.0   1.0     3.9
 20 p5      6.8   2.3   0.6   0.0   0.0     3.5

  sum     100.0 100.0 100.0 100.0 100.0   100.0


INERTIAS AND PERCENTAGES OF INERTIA
-----------------------------------

 1 0.148609  84.23%  **************************************************
 2 0.021834  12.38%  *******
 3 0.003743   2.12%  *
 4 0.002248   1.27%  *
   --------
   0.176434
```


ac
d5
p5
rt
WS
vi
K1
wd
d1
sf
p1
ON
ra
d2
p4
sp
we
fr
d3
d4
pr
K2
OK
p2
p3

APPENDIX D

KOUCHIBOUGUAC NATIONAL PARK INVENTORY

(inventaire du Parc National Kouchibouguac)

PRESENTATION PHYSIQUE DU PARC CHAPTER 1

INVENTAIRE DU PARC NATIONAL KOUCHIBOUGUAC

1.0 PRESENTATION PHYSIQUE DU PARC

- 1.1 Région
  - 1.1.1 la région du parc
  - 1.1.2 le comté de Kent
  - 1.1.3. la côte est du Nouveau Brunswick

- 1.2 Environnement physique
  - 1.2.1 le climat
  - 1.2.2 le relief
  - 1.2.3 les habitats naturels
  - 1.2.4 la faune
  - 1.2.5 la flore

- 1.3 Organisation spatiale (saisons)

- 1.4 Services et facilités touristiques
  - 1.4.1. le produit
    - 1.4.1.1 activités et attractions
    - 1.4.1.2. sites et services offerts
    - 1.4.1.3 interprétation du patrimoine naturel et culturel
    - 1.4.1.4 accueil et orientation
    - 1.4.1.5 information
    - 1.4.1.6 services de support

- 1.4.2. accessibilité
  - 1.4.2.1. réseau routier
  - 1.4.2.2 infrastructures aéroportuaire et ferroviaire
  - 1.4.2.3. infrastructure portuaire
- 1.4.3. promotion

1.0 PRESENTATION PHYSIQUE DU PARC

1.1 Région

Le profil du produit touristique de la région du parc national de Kouchibouguac est structuré spatialement sur la base de trois régions:

- la région immédiate du parc
- le comté de Kent
- la côte Sud-Est du Nouveau-Brunswick.

La région du parc ci-après décrite est la bse régionale la plus fréquemment utilisée.

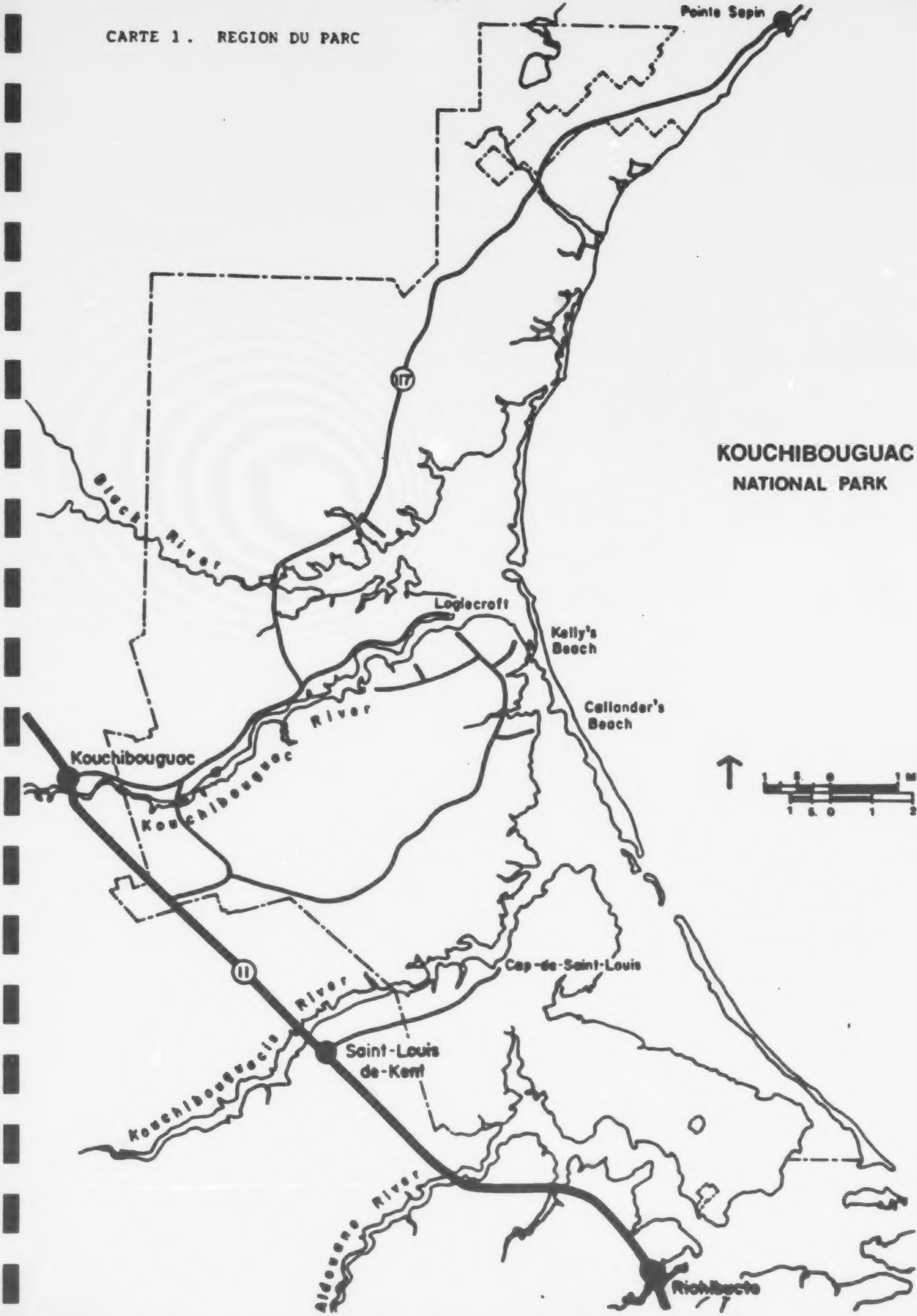
1.1.1 la région du parc

Cette région renferme les terres et les communautés à proximité du parc national de Kouchibouguac. Les communautés suivantes sont incluses dans la région:

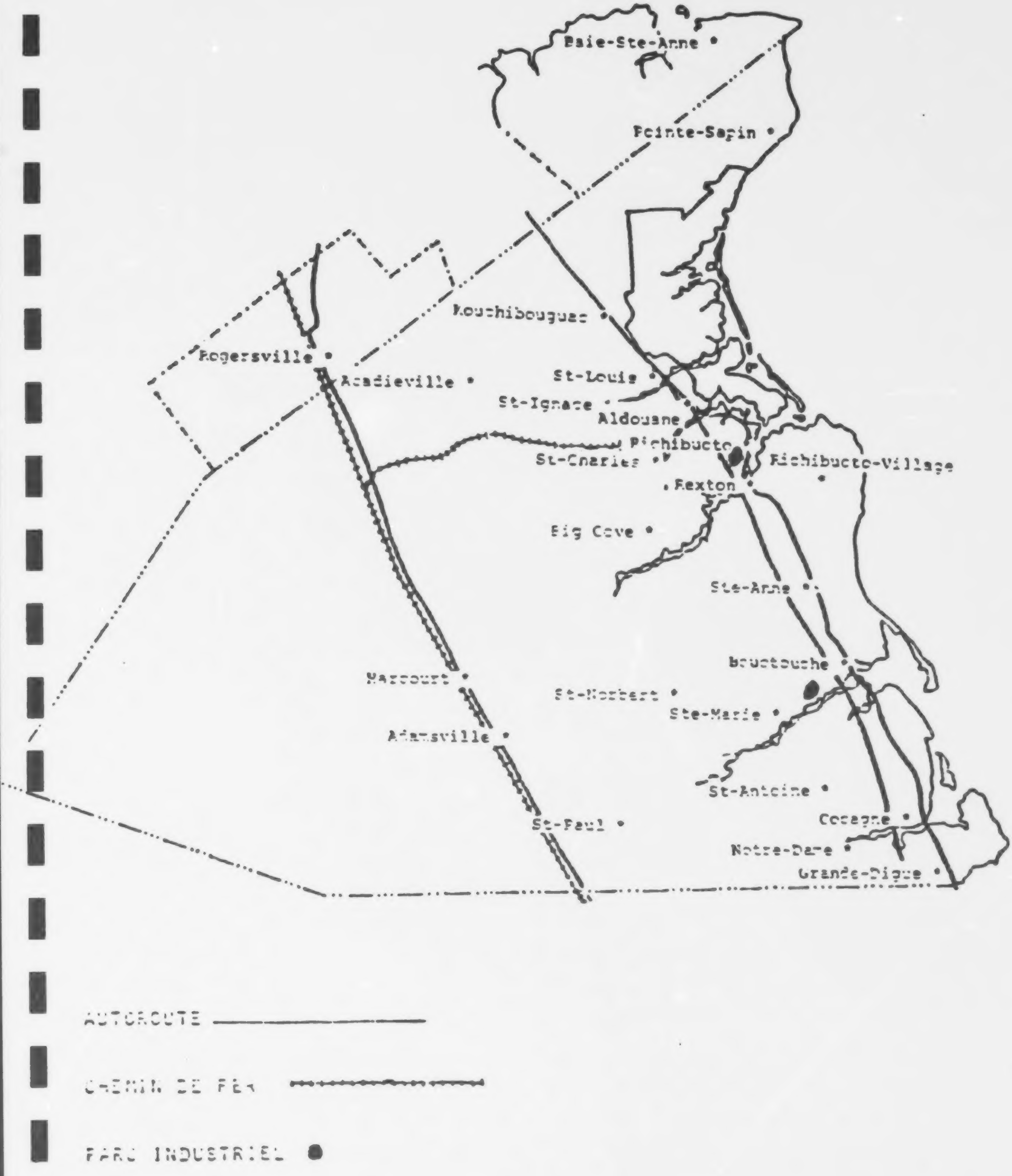
- Pointe-Sapin
- Kouchibouguac
- Saint-Ignace
- Saint-Louis de Kent
- Grande Aldouane
- Richibucto
- Richibucto-Village
- Rexton
- Cap-Lumière
- Réserve indienne de Big Cove

Les communautés de cette région, surtout celles de Pointe-Sapin, Kouchibouguac et Saint-Louis de Kent ont été principalement affectées par la création du parc. Les bénéfices associés à la présence du parc se font ressentir essentiellement dans cette région. C'est l'industrie touristique locale qui a le plus profité des ces répercussions. Les résidents locaux bénéficient aujourd'hui d'installations et d'aménagements récréatifs de haut niveau et facilement accessibles. (cf. cartes 1 et 2)

CARTE 1. REGION DU PARC


Pointe Sapin
KOUCHIBOUGUAC
NATIONAL PARK
117
Black River
Loggiecroft
Kelly's Beach
Callander's Beach
Kouchibouguac
Kouchibouguac River
1 .5 0 1 Miles
1 .5 0 1 2 Km
11
Cap-de-Saint-Louis
Kouchibouguacis River
Saint-Louis de-Kent
Aldouane River
Richibucto

CARTE 2 : REGION DU COMTE DE KENT


Baie-Ste-Anne
Pointe-Sapin
Kouchibouguac
Rogersville
Acadieville
St-Louis
St-Ignace
Aldouane
Richibucto
St-Charles
Richibucto-Village
Rexton
Big Cove
Ste-Anne
Bouctouche
Harcourt
St-Norbert
Ste-Marie
Adamsville
St-Antoine
Cocagne
St-Paul
Notre-Dame
Grande-Digue
AUTOROUTE
CHEMIN DE FER
PARC INDUSTRIEL ●

1.1.2. le comté de Kent

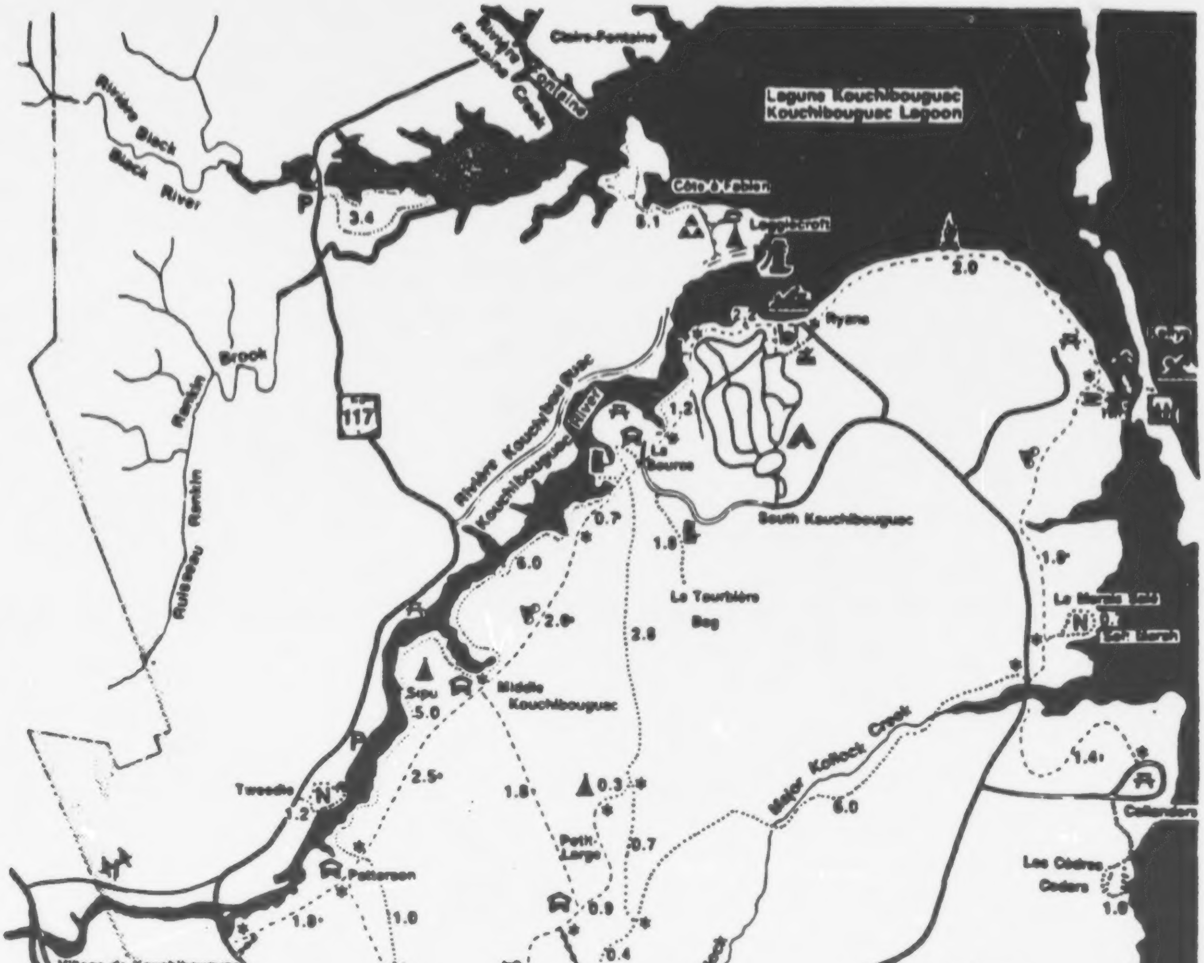
Cette région située à l'Est du Nouveau-Brunswick est formée de la région administrative du comté de Kent. Située entre la région de la Miramichi et la région de Moncton, le comté de Kent demeure une région rurale orientée vers le détroit de Northumberland. La majeure partie de sa population, qui s'élevait à 31,500 habitants en 1986, occupe la zone littorale. Les localités de Bouctouche, Saint-Antoine, Richibucto et Rexton sont les principales communautés du comté. Le parc Kouchibouguac est localisé dans le secteur nord du comté (cf. carte 3).

1.1.3 la côte du Sud-Est du Nouveau-Brunswick.

Le parc national Kouchibouguac est situé dans la grande région touristique (telle que définie par le gouvernement du Nouveau-Brunswick) de la côte du Sud-Est du Nouveau-Brunswick. Cette région inclut les comtés de Kent, Westmorland et Albert. La région est baignée par les eaux du détroit de Northumberland à l'est et par les eaux de la baie de Fundy au sud.

Cette région est une des principales régions touristiques de la province. Elle est traversée par le plus important flux d'excursionnistes et de touristes qui transitent vers l'Ile-du-Prince-Edouard, la Nouvelle-Ecosse et Terre-Neuve. La région et l'agglomération de Moncton offrent aux touristes plusieurs attractions et points d'intérêt. L'industrie touristique de cette région s'est considérablement développée au cours des vingt dernières années. Elle met à la disposition des touristes une vaste gamme d'infrastructures et de services touristiques offerts sur une base annuelle.

CARTE 3


Claire-Fontaine
Rivière Fontaine
Fontaine Creek
Lagune Kouchibouguac
Kouchibouguac Lagoon
Rivière Black
Black River
Côte à Fabien
Loggiecroft
3.4
5.1
2.0
2.2
Ryans
Brook
Rankin
Ruisseau Rankin
117
Rivière Kouchibouguac
Kouchibouguac River
1.2
La Source
0.7
1.8
South Kouchibouguac
6.0
2.9
2.8
La Tourbière
Bog
1.9
Le Marais
Salt Marsh
Sipu
Middle Kouchibouguac
5.0
Major Kollock Creek
1.4
Tweedie
1.2
2.5
1.8
0.3
6.0
Callanders
Petit Large
0.7
Patterson
Les Cèdres
Cedars
1.0
1.9
1.0
0.9
0.4
Village de Kouchibouguac
Kouchibouguac village
Ruisseau Major Kollock
Le Castor
Beaver
1.4
2.2
2.8
1.5
1.6
Pijeboogwek
Compound
0.8
Les Pins
Pines
Pointe à Mackie
Entrée du parc
Park entrance
480
10.0
134
Kouchibouguacis River
Cap-de-Saint-Louis
St.Louis Cape
11
Rivière Kouchibouguacis
Saint-Louis-de-Kent

1.2 Environnement

1.2.1 le climat

Qualifié de continental humide, le climat du parc est grandement influencé par la mer et est caractérisé par des précipitations uniformes et des étés chauds.

1.2.2 le relief

Le parc national de Kouchibouguac situé dans les plaines du Nouveau-Brunswick fait partie de la région physiographique les Plaines Maritimes. Légèrement incliné vers la côte, le sol est généralement plat, et accidenté de petits monticules séparant les bassins des rivières.

1.2.3 les habitats naturels

Les forêts du parc national de Kouchibouguac constituent une caractéristique importante du parc (54% de la région du parc) puisqu'elles font partie de la forêt acadienne elle-même caractérisant la région naturelle des plaines maritimes. Les forêts et la repousse des forêts couvrent toutes les zones du parc à l'exception des endroits où les sols sont trop humides ou instables. Trente-sept types de forêts sont identifiables. Les forêts de conifères dominent, comptant pour 70% de la région boisée du parc alors que les forêts de bois durs occupent 23% et les forêts mixtes, 7%.

Les tourbières de Kouchibouguac sont typiques de la région naturelle des plaines maritimes, et sont causées par les accumulations de tourbe lors des dépressions (21% de la région du parc).

Les lagunes et les estuaires du parc forment un écosystème riche et dynamique. On y retrouve une grande diversité d'animaux sauvages et une flore variée (18% de la région du parc).

Les marais salés sont situés sur les rives des estuaires et des lagunes sous l'influence des marées (3% de la région du parc). La végétation est particulièrement bien adaptée pour survivre dans un habitat à fortes concentrations salines. Soixante-douze espèces de plantes y ont été identifiées dont 8 sont des arbrisseaux, 3 sont des lichens et 61, des herbacées.

Les "Barrier Islands" (2% de la région du parc) constituent la caractérisque côtière la plus marquée. Les dunes North Kouchibouguac, South Kouchigouguac et North Richibucto constituent un réseau d'îles formées par les vagues et de pointes de terre entourées de lagunes et d'estuaires.

Les habitats d'eau douce ne constituent pas une caractéristique importante du parc (1% de la région du parc) En effet, les lacs Livain et Jardine, les deux seuls lacs, sont peut profonds et très acides.

Le parc Kouchibouguac est orienté vers le détroit Northumberland sur une distance de 36 kilomètres. Ne constituant pas une caractéristique dominante de la région, l'ouverture sur la mer influence toutefois grandement tant la flore que la faune dans les lagunes et les estuaires.

1.2.4 La faune

Les mammifères de la région naturelle de la plaine maritime sont très bien représentés dans le parc. Parmi les gros mammifères les plus communs, à noter le chevreuil à queue blanche et l'ours noir. Les plus petites espèces incluent quant à elles huit espèces de musaraignes et de taupes et neuf espèces de rongeurs. Les seuls mammifères marins occupant le Parc sont les phoques bien que des baleines peuvent être occasionnellement perçues au large.

Au total 19 espèces de poissons d'eau douce et d'eau salée ont été inventoriées.

Deux cent vingt-trois espèces d'oiseaux sont observables dans le parc et plusieurs d'entre elles sont typiques de la région naturelle de la plaine maritime. La migration automnale des oiseaux (commençant à la fin juillet) constitue un phénomène naturel et notoire.

Dans le parc de Kouchibouguac, les amphibiens et les reptiles se retrouvent principalement dans les habitats d'eau douce et les forêts.

1.2.5 La flore

La flore du parc national de Kouchibouguac est très diversifiée avec ses 614 espèces identifiées incluant 37 espèces d'orchidées. Cette diversité est attribuable aux divers habitats écologiques coexistant dans le parc.

1.3 Organisation spatiale (saisons)

La structure de l'offre en services d'hébergement à toiture fixe du comté de Kent illustre la saisonnalité de l'industrie touristique. La saison de pointe a lieu durant les mois de juillet et d'août avec un taux d'occupation respectif de 75.0% et 63.8%. La période de pointe au niveau des services de camping offerts par la région du Parc, se déroule de la mi-juillet à la mi-août. C'est au cours de cette période que la région accueille de nombreux touristes originant du centre du Canada et des Etats-Unis (cf. tableau 1).

Les visiteurs dans la région du comté de Kent peuvent profiter d'une gamme d'activités hivernales ou estivales. Plusieurs communautés présentent des festivals et des carnavals très populaires.

En été, les plus belles plages dans l'Est canadien attirent de nombreux visiteurs. Plusieurs activités locales en relation avec la mer et les rivières sont offertes, telles les régates internationales de Cocagne, la pêche à la truite, la navigation de plaisance et les visites d'usines de transformation. Le golf, le tennis ainsi que d'autres divertissements sociaux sont généralement de mise.

L'hiver est invitant aux adeptes de la motoneige, du ski de fond, de la raquette, de la chasse et de la pêche sur glace.

TABLEAU 1

COMTE DE KENT
HEBERGEMENT A TOITURE FIXE
TAUX D'OCCUPATION (1987-1988)

	ANNEE											
	1987		1988									
	Nov.	Déc.	Jan.	Fév.	Mars	Avril	Mai	Juin	Juil.	Août	Sept.	Oct.
Taux d'occupation (%)	19.2	21.6	n.d.	n.d.	29.8	28.1	34.2	34.6	75.0	63.8	42.2	31.0

nombre d'établissements: 15 (varie selon la période de l'année)

capacité: 116 unités (varie selon la période de l'année)

Source: Tourisme Nouveau-Brunswick 1988.

1.4 Services et facilités touristiques

1.4.1. Le produit

1.4.1.1. Activités et attractions

ACTIVITES

Dans la région du parc et, particulièrement la grande région touristique de la côte du Sud-Est du Nouveau-Brunswick, les touristes ont le choix entre les attractions touristiques, les points ou phénomènes d'intérêt qui peuvent être visités et les activités pouvant être pratiquées. La présence d'attractions majeures attirent, dans une certaine mesure, les visiteurs de l'extérieur et, parfois, favorise la prolongation de leur séjour dans la région. Ce phénomène accentue l'impact positif du tourisme dans l'économie régionale.

Dans le cadre des marchés touristiques des provinces maritimes et de la région du Sud-Est, les attractions les plus importantes constituent des concurrents au produit touristique du parc national Kouchibouguac. En raison de plusieurs facteurs, tels les besoins, les désirs, la durée du voyage ou le budget, les touristes et les excursionnistes sont contraints de planifier leur voyage et de choisir les attractions qu'ils visiteront. En conséquence, le parc national Kouchibouguac, doit "partager" le marché touristique atlantique avec les autres attractions de sa région ou même, des provinces Maritimes.

Le tourisme occupe de plus en plus une place de choix dans l'économie de la région du comté de Kent. Plusieurs installations touristiques ont été aménagées au cours des années et d'autant plus depuis la création du Parc national Kouchibouguac dans le secteur nord du comté.

Plusieurs musées et clubs sociaux et culturels offrent une gamme de divertissements aux visiteurs.

Les activités touristiques et récréatives se marient bien au mode de vie des habitants de la région du comté de Kent. La plupart des thèmes des festivals et des carnavals sont reliés au caractère typique de chaque région. Que ce soit le carnaval de la Bonne Humeur à St-Louis de Kent, le festival du Chou de Bruxelles à Rogersville, le festival de Pétoncles à Richibucto ou le festival de la Poutine à Saint-Antoine, il s'agit en somme d'un mode de vie que l'on fête partout dans la région.

De plus, des installations récréatives d'hiver et d'été sont à la disposition des habitants et des visiteurs. Les installations récréatives de la région se composent de:

Arénas:	Baie-Sainte-Anne, Big Cove, Bouctouche, Cocagne, Richibucto, Rogersville, Sainte-Marie
Cinéma:	Richibucto
Ciné-parcs:	St-Louis-de-Kent, Sainte-Anne
Club de curling:	Bouctouche, Saint-Ignace
Marinas:	Aldouane, Cocagne
Musées:	Bouctouche, Rexton
Parc Municipal:	Richibucto
Parc national:	Kouchibouguac

Parc provincial:	Cocagne
Salles de quilles:	Acadieville Baie-Sainte-Anne, Bouctouche, Cocagne, Notre-Dame, Richibucto, Rogersville, Saint-Antoine
Terrains de balle:	Acadieville, Aldouane, Baie-Sainte-Anne, Big Cove, Bouctouche, Cocagne, Grande-Digue, Notre-Dame, Pointe-Sapin, Rexton, Richibucto, Richibucto-Village, Rogersville, Saint-Antoine, Saint-Charles, Saint-Ignace, St-Louis-de-Kent, Saint-Paul, Sainte-Anne, Sainte-Marie.
Terrains de jeux:	Bouctouche, Grande-Digue, Notre-Dame, Rexton, Richibucto, Saint-Antoine, St-Louis-de-Kent
Terrains de tennis:	Acadieville, Bouctouche, Notre-Dame, Richibucto, Saint-Antoine, St-Louis-de-Kent, Sainte-Marie.

Dans le comté de Kent, les activités estivales suivantes peuvent être pratiquées avec ou sans infrastructure de support.

- Pêche et excursion en mer
- Natation et baignade (plages surveillées)

- Glissade d'eau
- Planche à voile
- Voile
- Canotage
- Cyclisme
- Camping, canot-camping
- Magasinage d'artisanat
- Visite de musées
- Observation des oiseaux
- Randonnée sur la plage
- Golf, mini-golf

Les festivals sont très populaires dans la région de l'Atlantique. Les communautés du comté de Kent organisent à chaque été de nombreaux festivals. Les touristes ont la possibilité de se joindre aux populations locales au cours d'une quinzaine de festivals et manifestations.

FESTIVALS (1988)

Manifestation	Endroit
- Festival des foins	Sainte-Marie de Kent
- Festival des bûcherons	Rogersville
- Festival du pétoncle	Richibouctou
- Festival du bon pêcheur	Pointe-Sapin
- Festival du râpé acadien	Acadieville
- Festival des mollusques	Bouctouche
- Course de bateaux de pêche	Cocagne
- Festival du choux de Bruxelles	Rogersville
- Pique-nique de Big Cove et Sainte-Anne	Big Cove
- Festival de la musique "Country"	Saint-Antoine

- Régates internationales de Cocagne	Cocagne
- Journées de retrouvailles	Rexton
- Festival du blé d'inde	Aldouane
- Exposition agricole de Kent	Ste-Marie de Kent

En outre, à Shediac et Moncton seulement, vingt-quatre manifestations diverses sont tenues au cours de l'été. Vingt d'entre elles ont lieu à Shediac et au parc provincial de la plage Parlee.

Activités et services estivals du Parc National Kouchibouguac

- Accueil: . Centre d'information

- Interprétation: . Centre d'information

    - exposition
    - présentations audio-visuelles
    - documentation touristique
    - souvenirs

  . Activités organisées

    - 7 programmes en soirée (théâtre en plein air)
    - 2 feux de camps animés par semaine
    - 6 excursions familiales
    - 4 programmes spéciaux
    - 4 présentations de spectacles de marionnettes par semaine (Plage Kelly's)
    - Exposition sur la promenade de la plage Kelly (30 sujets par été)

. Activités auto-guidées

- 5 sentiers de la nature
- exposition au centre d'information

- Sentiers de la nature:
  - . Promenade de la plage Kellys (Plage Kellys)
    - 0.5 km
    - Panneaux d'interprétation, belvédère

  - . Le Castor (Secteur central)
    - 1.4 km
  - . Les Cèdres (Secteur central)
    - 1.0 km
  - . Les pins (Secteur central)
    - 0.8 km
  - . Tweedie (Route 117)
    - 1.2 km
  - . La Tourbière (Secteur central)
    - 1.8 km
    - panneau d'interprétation, tour d'observation
  - . Le Marais salé (entre Kellys et Callanders)
    - 0.7 km
    - panneaux d'interprétation

- Randonnée pédestre:
  - . Sentier Claire-Fontaine (Rivière Black)
    - 3.4 km
  - . Sentier de la Rivière Kouchibouguac (Rive-sud)
    - 14 km
    - belvédère

- . Sentier du ruisseau des Major Kollock (Secteur central)
  - 11 km

- Randonnée à bicyclette:
  - . Réseau de pistes de 22.6 km
  - . Centre de location à Ryans
    - . 25 bicyclettes disponibles
  - . Belvédère:
    - . La Source
    - . Plage Kellys
    - . La Tourbière
    - . Sentiers

  Sites accessibles par le réseau
    - . 6 abris chauffés
    - . sites d'activités de la Source
    - . Ryans, plages Kellys et Calanders
    - . Camping South Kouchibouguac
    - . Centre d'information

- Pique-nique:
  - . Plage Kellys
    - . bâtiment de services
    - . cantine
  - . Plage Callenders
  - . La Source
    - . bâtiment de services

- Canotage:
  - . Centre de location (Ryans)
    - . 15 canots
    - . 6 chaloupes
    - . 8 pédalos

. Rampe de mise à l'eau (canot)
    . Ruisseau des Major Kollack
    . Rivière Black

- Rampe de mise à l'eau pour embarcation:

. Quai de Cap Saint-Louis
. Quai de Loggiecraft

- Canot-camping: . Dune Richibouctou
. Nord (sans impact)
. Sipu (camping primitif)
. Pointe à Maxime (camping primitif)

- Planche à voile: . activité non encouragée

- Pêche sportive: . permise mais non encouragée.

ACTIVITES ET SERVICES HIVERNAUX DU PARC NATIONAL KOUCHIBOUGUAC

- Ski de randonnée: . réseau de 25 km de pistes entretenues
. 21 km pour le ski de randonnée traditionnel
. 9 km pour le ski de randonnée avec le pas de patinage
. 6 refuges chauffés
    1- Pijeboagwek
    2- Patterson
    3- Middle Kouchibouguac
    4- South Kouchibouguac
    5- La Source
    6- Petit-Large

	. un abris de fartage, refuge Patterson . une aire de stationnement; refuge Pijeboagwek
- Raquette:	. Sentier de 5.2 km reliant Ryans à Callanders
- Toboggan:	. Refuge Patterson
- Camping d'hiver:	. Camping primitif Petit-Large
- Motoneige:	. sur les rivieres gelées exclusivement . permis requis

ATTRACTIONS

Au Nouveau-Brunswick et ailleurs dans les provinces Maritimes, d'autres attractions reconnues exercent une influence sur les touristes et les excursionnistes du marché touristique atlantique.

Les plus renommées sont:

- L'Ile-du Prince-Edouard	Parc national, plage de Cavendish, la maison Green Gable attractions touristiques
- La route de Cabot	Ile du Cap-Breton
- Forteresse de Louisbourg	Ile du Cap-Breton
- Halifax	Citadelle, Peggy's Cove services et attractions, Tattoo, Buskers
- La péninsule acadienne	Village historique acadien, musée des Papes, centre marin de Shippagan, culture acadienne

- Parc historique King's Landing	
- Parc provicial Mataquac	Barrage hydroélectrique
- Chutes réversibles de St-Jean	Effets des marées

Région du Sud-Est

La région du Sud-Est offre des attractions de renommée. Certaines d'entre elles s'avèrent d'un grrand intérêt pour les touristes et les familles. On peut les regrouper en fonction de leur caractère récréatif, historique, culturel ou naturel.

Attractions à caractère "récréatif":

- Parc aquatique de Magic Mountain	Moncton
- La Côte Magnétique	Moncton
- Parc provincial de la plage Parlee	Shediac (plage aux eaux chaudes, glissade d'eau et autres services)

Attractions à caractère "culturel" et historique":

- Moncton	Université francophone (musée Acadien), restaurants, centres d'achat, musée, parc du Mascaret

- Parc historique national du Fort Beauséjour

Attractions à caractère "naturel":

- Rochers Hopewell	"Pots de fleurs" (plus hautes marées au monde)
- Mascaret de la rivière Peticodiac	
- Parc national Fundy	

Comté de Kent

Dans le comté de Kent, on retrouve le musée de Kent et un terrain de golf à Bouctouche, le parc provincial de Cocagne et de longues plages de sable sur la côte.

Région du parc

Dans la région du parc, on retrouve une dizaine d'attractions susceptibles de susciter l'intérêt des touristes. En général, elles sont orientées sur la pratique d'activités en famille ou en plein air:

- Parc d'amusement de Kent	Près de l'entrée du parc (glissade d'eau, mini-golf)
- Mappemonde géante	
- Golf St-Ignace	18 trous
- Pêche en hauge mer	. Pointe-Sapin . Richibouctou (1988)
- Etang de pêche à la truite	Saint-Charles Nord

- Musée de la rivière Richibouctou	Rexton
- Parc historique Bonar Law	Rexton

1.4.1.2. Sites et services offerts

Le tableau ci-après dresse la liste des divers sites et services diurnes offerts au parc national Kouchibouguac

SITE	LOCALISATION	UTILISATEURS	SERVICES/FONCTIONS
- Centre d'information	Entrée du parc (secteur central)	. Visiteurs du parc	. Accueil . Information . Orientation . Interprétation . Sanitaires
- Plage Callanders	Callanders (secteur central)	. Pique-niqueurs . Randonneurs . Cyclistes . Promeneurs en automobile . Groupes . Campeurs . Observateurs d'oiseaux	. Pique-nique . Aire de stationnement . Sanitaires
- Plage Kellys	1. Cordon littoral (secteur central)	. Baigneurs . Pique-niqueurs . Observateurs d'oiseaux . Marcheurs . Groupes . Campeurs	. Surveillance (sauveteurs) . Sentier, belvédère . Interprétation (panneaux, théâtre de marionnettes activités guidées)
	2. Terre ferme (secteur central)	. Pique-niqueurs . Baigneurs . Randonneurs . Campeurs . Promeneurs en automobile . Groupes (autobus, etc.) . Clients de la cantine	. Pique-nique . Cantine . Aire de stationnement . Bâtiment de services . Sentier de randonnée et piste cyclable

- Ryans	Ryans (secteur central)	. Cyclistes . Promeneurs en automobile . Randonneurs . Utilisateurs des canots, chaloupes et pédalos . Clients du restaurant . Campeurs (théâtre en plein air) . Groupes	. Centre de location . Restaurant . Sanitaires . Sentiers de randonnée et pistes cyclables . Aire de stationnoement
- La Source	La Source (secteur central)	. Pique-niqueurs . Promeneurs en automobile . Cyclistes . Randonneurs . Groupes . Campeurs	. Pique-nique . Sanitaires . Sentier de randonnée et piste cyclable . Belvédère

1.4.1.3. Interprétation du patrimoine naturel et culturel

Le centre d'information renferme une exposition illustrant les thèmes du parc, des éléments en démonstration, des panneaux d'information sur des sujets spéciaux, un mini-comptoir à souvenirs et un distributeur de documentation touristique. Le centre abrite une salle de projection de 70 places où deux spectacles audio-visuels sont présentés toute l'année durant.

Le parc offre une gamme de services personnalisés dans les deux langues officielles. Ils présentent les thèmes du parc mettant en valeur la représentativité, la diversité et la richesse du patrimoine du parc. Les programmes spécialisés sont les suivants:

- programmes en soirée-théâtre en plain air (Ryans)
- théâtre de marionnettes (Plage Kellys)
- feux de camp (entre Ryans et la plage Kellys)
- expositions sous le parasol (promenade de la plage Kellys)
- excursions en famille (divers sites et habitats)
- programmes spéciaux-parade
- événements spéciaux - course cross-country, marathon de ski de randonnée.
- programmes scolaires - un programme d'interprétation destiné aux étudiants est mis à la disposition des écoles de la région du comté de Kent et ailleurs au Nouveau-Brunswick durant l'hiver (9 semaines)

Le parc met à la disposition des visiteurs des services et des installations autoguidés:

. sentiers de la nature dotés de panneaux d'interprétation (plage Kellys, la Tourbière, le Marais salé);

. panneaux d'interprétation au camping South Kouchibouguac;

. quatre autres sentiers de la nature sans panneau

1.4.1.4. Accueil et orientation

- Un kiosque situé à l'entrée principale du parc, sur la route 117, est desservi par du personnel, de la mi-juin à la fête du Travail. Les heures d'opération s'étirent de 8h00 à 19h30. De l'information et de l'orientation préliminaires peuvent y être obtenues.

- Centre d'information. Le personnel bilingue préposé aux visiteurs offre un service complet d'information sur les services et les programmes, et d'orientation sur les aménagements et les activités dans le parc. Le personnel est présent du 18 juin au 15 septembre durant la saison estivale, de 8h00 à 19h30. En période hors saison, le personnel est disponible lors des fins de semaine.

- Le bureau administratif, adjacent au centre d'accueil, est ouvert au public à l'année longue. Le personnel y est disponible pour remettre de l'information (en période hors-saison, plus particulièrement).

- Les membres du Service des gardes de parc et les préposés aux visiteurs disséminés dans le parc sont aptes à fournir de l'information ou à orienter les visiteurs.

- Les panneaux de signalisation et d'orientation installés sur les routes, le réseau de sentiers et les sites d'activités permettent aux visiteurs de s'orienter.

- Le guide destiné aux visiteurs renferme une carte des sites d'activités et du réseau de sentiers du parc.

1.4.1.5 Information

- De l'information spécifique ou générale est offerte au centre d'information, au centre administratif, aux kiosques des terrains de camping South Kouchibouguac et Côte à Fabien (selon les saisons et les heures d'opération).

- Un guide destiné aux visiteurs est mis à la disposition des visiteurs. Il renferme de l'information sur les services d'information et de plein air, les programmes personnalisés ou autoguidés d'interprétation, les installations et les activités qui peuvent être pratiquées dans le parc. Il contient aussi de l'information sur les services touristiques et généraux disponibles dans la région immédiate du parc.

- Des guides destinés aux visiteurs sont disponibles dans les principaux kiosques d'information touristique de la province et dans les établissements touristiques situés dans les communautés locales.

- Une chronique d'information est diffusée quotidiennement en matinée sur les ondes de la station radiophonique CFAN-MIRAMICHI.

1.4.1.6. Services de support

Hébergement

Le comté de Kent dispose d'une offre en services d'hébergement. Elle comprend: les motels, les gîtes du passant, les cabines ou chalets et les services de camping.

En raison du caractère saisonnier de l'industrie touristique au Nouveau-Brunswick, la capacité d'accueil et les types d'hébergement varient au cours de l'année. Ainsi, trois des cinq motels sont ouverts durant la saison morte alors que les autres établissements sont fermés.

La plupart des établissements du comté de Kent (60%) sont localisés dans la région immédiate du parc, soit à Richibouctou et Saint-Louis-de-Kent. Ce phénomène de concentration est encore plus évident dans le cas des terrains de camping privés (83% des emplacements disponibles).

Trois motels sont établis dans la région du parc. Ils représentent 70% des unités disponibles dans le comté. Deux d'entre eux opèrent à l'année longue.

Les gites du passant et les cabines ou chalets sont assez nombreux. Ils représentent 66.7% des établissements. Ils se distinguent toutefois par une faible capacité d'accueil: en moyenne 4 unités chacun. Ces établissements sont mieux distribués dans le comté que les unités de motel qui sont surtout concentrées en périphérie du parc (cf. tableau 2).

En saison hivernale, la région du parc accapare 70% des unités disponibles.

Tous les terrains de camping du comté de Kent, sauf un, sont aménagés en périphérie du parc. Leur capacité d'accueil totale s'élève à 719 emplacements dont 641 sur la région du parc et 249 sur le Parc national Kouchibouguac. Les terrains de camping de la région mettent à la disposition des campeurs une variété de services qui correspondent à ceux identifiés par les visiteurs lors d'une enquête menée auprès des visiteurs du parc national Kouchibouguac, à l'été 1981 (cf. tableaux 3 et 4)

TABLEAU 2

HEBERGEMENT

ETABLISSEMENTS ET UNITES

Type d'hébergement	Région du parc		Comté de Kent	
	Etablissement	Unité	Etablissement	Unité
Hôtel	---	---	---	---
Motel	3 (2)	55(48)	5(3)	76(58)
Cabine\Chalet	3	17	5	28
Gîte du passant (bed and breakfast)	3	8	5	12
TOTAL	9	80	15	116

(): nombre d'établissement et d'unités ouverts à l'année
Source: Nouveau-Brunswick. Gites touristiques et terrains de camping. 1988.

TABLEAU 3

REGION DU PARC

TERRAINS DE CAMPING (1988)

Localité	Terrain de camping	Emplacement	Emplacement avec électricité
Pointe-Sapin	1	35	--
Richibouctou	2	117	59
Saint-Louis-de-Kent	2	240	121
Sous-total	5	392	180
Parc national Kouchibouguac	2	249	--
Total région du parc	7	641	180
Bouctouche	1	37	20
Rogersville [1]	1	41	41
Total comté de Kent	9	719	241

[1] Localisé à l'extérieur du comté de Kent

Source: Nouveau-Brunswick. Gites touristiques et terrains de camping. 1988

TABLEAU 4

PARC NATIONAL KOUCHIGOUGUAC

OFFRE DE SERVICES

SERVICES AMENAGEMENTS ET ACTIVITES OFFERTS (1988)

HEBERGEMENT

CAMPING	LOCALISATION	EMPLACEMENTS	REMARQUE
Camping semi-aménagé			
- South Kouchibouguac	Rivière Kouchibouguac Accès par la route Kellys	219	Accessible aux roulottes motorisées, roulottes, tentes-roulottes. Bâtiments de services, terrains de jeux pour enfants.
- Côte à Fabien	Baie de Kouchibouguac. Accès par la route du quai de Loggiecroft.	30	Accessible aux roulottes motorisées, roulottes, tentes-roulottes. Bâtiment de services.
Camping primitif			
- Petit Large	Secteur central. Accès à pied ou à bicyclette par le réseau de sentiers	10	Utilisé pour le le camping d'hiver par les groupes
- Sipu	Secteur central, sur le rives de la rivière Kouchibouguac. Accès à pied ou en canot	4	Canot-camping
- Pointe à Maxime	Lagune Saint-Louis à la	8	Accès à pied

	pointe à Maxime. Accès en embarcation.		difficile
Camping de groupe			
- Côte à Fabien (temporaire)	Secteur du quai de Loggiecroft. Accès par la route du quai.		Services sanitaires
Camping sans impact			
Dune Richibouctou Nord	Cordon littoral		Aucun service

Restaurants

Dans la région du parc, neuf restaurants ou cantines offrent des services de restauration variant des repas complets servis dans les salles à manger licenciées jusqu'aux casse-croûte pour emporter. Six de ces entreprises sont localisées à Richibouctou et à Saint-Louis de Kent.

Epiceries et dépanneurs

Huit épiceries et dix dépanneurs sont établis dans la région du parc. Chaque localité bénéficie de la présence d'au moins d'une épicerie et un dépanneur. Les épiceries sont souvent intégrées à des stations-service ou à des établissements à vastes surfaces, tels les coopératives agricoles. Les dépanneurs, bien qu'ils offrent un ensemble limité de produits, peuvent généralement satisfaire les besoins de base des campeurs et des touristes. Ils sont souvent eux-aussi intégrés à des stations-service.

L'ensemble des épiceries et des dépanneurs opèrent sur une base annuelle, sauf un marchand de fruits et de légumes situé à proximité de l'entrée du parc.

Autres

Des services sanitaires sont offerts sur les sites d'activités, sur les campings et au centre d'information.

1.4.2. Accessibilité

Le comté de Kent et le sud-est du Nouveau-Brunswick sont dotés de bonnes infrastrustures de transport qui facilitent la circulation des personnes et des biens. En raison de sa situation géographique, la région de Kent a accès à un système de transport routier, ferroviaire, aérien et portuaire situé à proximité.

1.4.2.1. Réseau routier

Au cours de la dernière décennie, ce réseau a été considérablement amélioré grâce à la route 15 à voies séparées et la nouvelle route 11 qui assure la circulation rapide entre le nord-est et le sud-est de la province. Cette route est la principale voie d'accès au parc et à sa région immédiate.

La route 11 et la route 134 desservent les principales localités de la zone littorale. Elles supportent le flux d'excursionnistes et de touristes originant du Québec et de l'Ontario qui visitent ou transitent par la côte est du Nouveau-Brunswick au cours de la saison estivale. La route 126 assure la circulation entre la région de la Miramichi et Moncton dans l'arrière-pays du comté alors que les routes 116 et 115 permettent la circulation est-ouest.

La route Transcanadienne et les routes 15 et 16 supportent une haute densité de circulation surtout durant l'été. La route 15 permet d'accéder directement aux plages de Shédiac tandis que la route 16 donne accès à Cap Tourmentine et au service des traversiers reliant le continent à l'Ile-du-Prince-Edouard.
Enfin, la route 114 longe la côte de la Baie de Fundy et guide les touristes vers le parc national Fundy.

1.4.2.2 Infrastructures aéroportuaire et ferroviaire

La région du comté de Kent est située à faible distance des aéroports de Chatham et de Moncton. Les aéroports offrent des vols réguliers pour voyageurs ainsi que le transport de marchandises.

L'ouest du comté est traversé par une ligne ferroviaire nord-sud.

1.4.2.3. Infrastructure portuaire

La région du comté de Kent est située non loin des ports maritimes de Saint-Jean, le troisième plus grand port au Canada et de Newcastle, tous deux ouverts à la navigation 12 mois par année.

Les localités de Pointe-Sapin, Richibouctou, Cap-Lumière, St-Edouard-de-Kent, Bouctouche, Bar-Cocagne, Saint-Thomas, Cocagne Cape, Cap=des-Caissie sont toutes dotées d'un quai équipé d'installations pour les pêcheurs.

Une marina localisée à Petite Aldouane sur la rivière Saint-Charles, au nord de Richibouctou, peut accueillir les embarcations de plaisance.

1.4.3. Promotion

- Le parc est identifié dans les publications nationales et régionales publiées et distribuées par l'administration centrale et le bureau régional de l'Atlantique du Service canadien des parcs.

- Une campagne nationale de promotion du réseau des parcs nationaux destinée aux Canadiens a été diffusée sur les réseaux nationaux de télévision en 1988.

- Une campagne de promotion du parc et de ses services est entreprise annuellement dans les media écrits du Nouveau-Brunswick (Miramichi, Moncton et comté de Kent).

- Le personnel du parc participe à des expositions ou salons pertinents tenus au Nouveau-Brunswick (salons de plein air, industriels, tourisme, etc.).

- Une chronique d'information est diffusée quotidiennement en matinée sur les ondes de la station radiophonique CFAN-MIRAMICHI (5 minutes) au cours des saisons estivale et hivernale.

- Des guides destinés aux visiteurs sont distribués dans les principaux kiosques touristiques situés dans la province du Nouveau-Brunswick. Le guide décrit les services, les programmes et les activités du parc. Il contient également de la publicité sur les services touristiques et récréatifs offerts dans la région immédiate du parc.

ASPECTS SOCIAUX CHAPTER 2

2.0 ASPECTS SOCIAUX

2.1 Population régionale

La population de la région du comté de Kent est estimée à 33,038 habitants (1986). Le comté de Kent a une population à faible densité qui est en grande partie regroupée dans une vingtaine de communautés, la plupart localisées dans l'est du comté. La population de ces comtés varie entre 500 et 2,500 habitants.

Les populations de la région du parc et du comté de Kent ont augmenté légèrement au cours des dix dernières années. La population de la région du parc s'est accrue de 3.4% entre 1981 et 1986, tandis que la population du comté de Kent présente un taux de croissance total de 8.6% entre 1976 et 1986, soit un taux annuel moyen inférieur à 1.0%.

En 1986, la population de la région du parc s'élevait à près de 11,000 habitants et le comté de Kent représentait à peine 20% de la population de la côte du Sud-Est dépassant 167,000 personnes (cf. tableau 5).

2.2 Langue

Le français et l'anglais sont les principales langues maternelles déclarées. Dans le comté de Kent, 71% de la population désigne le français comme langue maternelle, alors que 15.5% de la population déclare l'anglais. Le Micmac est utilisé par environ 3.3% de la population du comté.

TABLEAU 5

POPULATION DES REGIONS ET DES SUBDIVISIONS ADMINISTRATIVES

(1981 ET 1986)

Région\ Subdivision	Population 1981	1986	Variation (%)
Indian Island réserve)	56	64	14.3
Rexton ville)	928	926	-0.2
Richibouctou paroisse)	1861	1956	5.1
Big Cove (réserve)	964	1118	16.0
Richibouctou (ville)	1722	1609	-6.6
aint-Charles (paroisse)	1907	2049	7.4
aint-Louis (paroisse)	1928	2070	7.4
aint-Louis-de-Kent village)	1166	1101	-5.6
égion du parc	10,532	10,893	3.4
omté de Kent	31,763	33,038	4.0
Côte du Sud-Est	163,071	167,297	2.6
gglomération de Moncton		74,840	

Sources: Statistiques Canada. 94-107. Nouveau-Brunswick. Partie 1
Statistiques Canada. 94-108. Nouveau-Brunswick. Partie 2

2.3 Population active

Le comté de Kent se caractérise par une économie relativement orientée vers les secteurs primaire et secondaire. Le secteur tertiaire prend une place relativement moins prédominante par rapport à l'économie provinciale. Il occupe néanmoins 68.3% de la population active de 15 ans et plus (cf. tableau 6)

TABLEAU 6

POPULATION ACTIVE (1) PAR SECTEUR DE L'ECONOMIE (1986)

ECTEUR	COMTE DE KENT (%)	NOUVEAU-BRUNSWICK (%)
PRIMAIRE	12.1	8.1
SECONDAIRE	19.6	14.6
ERTIAIRE		
industries de commerce	14.5	17.2
industries de la construction	11.2	6.8
- industries du transport, de l'entreposage, des communications et autres services publics	7.4	8.8
- Industries et services gouvernementaux	6.4	10.4
- Industries des finances, des assurances et des agences immobilières	2.6	3.7
ERTIAIRE	68.3%	77.3%

(1) population active de 15 ans et plus

ource: Statistiques Canada. 94-108

Le secteur primaire est structuré autour des activités de la pêche, de l'agriculture et de la foresterie. L'industrie touristique - secteur tertiaire - assume également un rôle significatif dans l'économie régionale. De nombreuses entreprises du comté sont directement ou indirectement associées aux tourismes régional et provincial. Cette industrie se distingue toutefois par des activités et des possibilités d'emploi saisonnières.